



Charitable IRA Rollover

Qualified charitable distributions up to \$100,000 may be made directly to Joslin from your IRA (except 401K, 403B, SEP or certain other plans) provided you are 70 ½ years old at the time of transfer. Transfers must be made directly from a traditional IRA account by your IRA administrator to Joslin Diabetes Center. The funds that you withdraw and contribute directly to Joslin are not included in your gross income for federal income tax purposes. While you can count the withdrawal toward your minimum required distribution, no charitable deduction is available.

In order to request the IRA rollover transfer you need to contact your IRA provider by letter or email. The following suggested content may be used:

Dear (insert name of agent),

I wish to make a qualified charitable contribution from my Individual Retirement under Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986 and made permanent under the Consolidated Appropriations Act of 2016. My account Number is [insert account number].

If requesting a check be sent, the following may be used: Please issue a check in the amount of \$__ payable to The Trustees of Joslin Diabetes Center and mail to: Thomas Giddens, Planned Giving Advisor, Joslin Diabetes Center, One Joslin Place, Boston, MA 02215.

If you are requesting a wire transfer be sent the following may be used: Please execute a wire transfer in the amount of \$__ to Joslin Diabetes Center (Tax ID Number: 04-2203836) with the following information (which Joslin will furnish to the donor upon request):

Beneficiary Name: Joslin Diabetes Center	Legacy Account Number:
Bank Name:	Bank Address:
ABA Number:	Swift Code:

Please state my name and address as the donor of record in connection with this transfer and copy me on your transmittal. It is my intention to have this transfer qualify during the 20XX tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20XX.

For more information, contact Tom Giddens, Planned Giving Advisor, at thomas.giddens@joslin.harvard.edu or 617-309-2412.

One Joslin Place, Boston, MA 02215 | joslin.org | 617-309-2412