



IRA QUALIFIED CHARITABLE DISTRIBUTION (QCD) FORM

IRA QCDs, also known as IRA Charitable Rollovers, are a popular way for donors 70 ½ or older to support the mission of the Outrigger Duke Kahanamoku Foundation. You can make tax-free charitable distributions annually, while lowering your taxable income and satisfying your Required Minimum Distribution (if subject to RMD). Talk to your financial advisor for more specific information.

To initiate a qualified charitable distribution from your IRA to the Outrigger Duke Kahanamoku Foundation, your IRA trustee will need the following information:

Legal name: Outrigger Duke Kahanamoku Foundation

Taxpayer ID: 99-0217299

Permanent address: P.O. Box 160924, Honolulu, Hawai'i 96816

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when the Outrigger Duke Kahanamoku Foundation receives the QCD gift from my financial institution, it will provide me with a written acknowledgment of the gift date and amount, stating no goods or services were transferred to me in consideration for the gift.

In your transmittal to the Outrigger Duke Kahanamoku Foundation, **please indicate my name and address as the donor of record and copy me on your correspondence in connection with this transfer.** It is my intention to have this transfer qualify for exclusion during this tax year.

Donor's signature: _____ Date: _____

Printed Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

Email: _____

IRA gift amount: \$ _____

IRA Gift Designation: _____

Name of IRA financial institution: _____

Please return this form to your IRA trustee and instruct him or her
to send the form and your IRA charitable rollover gift to:

Outrigger Duke Kahanamoku Foundation