The Jackson Laboratory

*Leading the search
for tomorrow's cures*

IRA Distribution & Securities Transfer Information

Distribution from an IRA

If you are 70½ years old or older, you can take advantage of a simple way to support tomorrow's cures and receive tax benefits in return. You can give up to $100,000 from your IRA directly to The Jackson Laboratory without having to pay income taxes on the money.

Why Consider This Gift?

- Your gift will be put to use today, allowing you to see the difference your donation is making.
- You pay no income taxes on the gift. The transfer generates neither taxable income nor a tax deduction, so you benefit even if you do not itemize your deductions.
- If you have not yet taken your required minimum distribution for the year, your IRA charitable rollover gift can satisfy all or part of that requirement.

How to Make this Gift?

Simply instruct your IRA Fund manager to forward your gift directly from the account payable to:

> **Legal name:** The Jackson Laboratory
> **Federal Tax ID number:** 01-0211513
> **Located in:** 600 Main Street, Bar Harbor, ME 04609

Note: if you are writing a check from your IRA to make a charitable gift, please send your gift several weeks before December 31. With IRA charitable qualified distributions, the date of gift is <u>not</u> established when you mail your check. Rather, the date of gift is established when the IRA administrator transfers funds after JAX deposits the check. This is very important if you are relying on your gift to meet your required minimum distribution for the year.

To Transfer Securities:

After completing section 1, below, please email this document to advancement@jax.org and forward a copy to your broker so that they may complete the transfer.

FOR DONOR ONLY   Please send the following information to your broker:

Donor Name: _____

Name of Securities: _____

Number of Shares: _____

FOR BROKER ONLY   Please provide all of the following information when making the transfer:
DTC Delivery Instructions:

- Account # 6BP-02068
- Account Name: The Jackson Laboratory
- Bank Name: Bank of America Merrill Lynch
- DTC Number: 8862
- From: Donor Surname

Questions, please contact: advancement@jax.org or (800) 474-9880

Thank you for your support of The Jackson Laboratory.