



**QUALIFIED CHARITABLE DISTRIBUTIONS MUST BE MADE BY DECEMBER 31<sup>ST</sup> EACH YEAR.**

**GOLDSTAR IRA ACCOUNT OWNER**

Name: \_\_\_\_\_ Account Number: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_  
Email Address: \_\_\_\_\_

**CHARITABLE DISTRIBUTION REQUIREMENTS (All questions must be answered YES to be a qualified charitable distribution)**

- |  |     |    |
|--|-----|----|
| 1. Will you have attained age 70 ½ or older as of the date of this distribution?   | YES | NO |
| 2. Is this entire distribution fully deductible as a charitable distribution under Internal Revenue Code Section 170, and do you certify that you will receive no additional benefit from the receiving organization in return for this charitable contribution? | YES | NO |
| 3. Does this distribution consist entirely of pre-tax assets from the IRA?   | YES | NO |
| 4. Will the amount of the charitable distribution from this IRA, when combined with all other qualified charitable IRA distributions you may be taking in the current year, be \$100,000 or less?  | YES | NO |
| 5. Is the receiving organization a church, educational organization, medical organization, private foundation, or other charitable organization listed under Internal Revenue Code Section 170(b)(1)(A)?   | YES | NO |

**PAYMENT INSTRUCTIONS (Make the check payable to the following organization)**

Name of Charity: \_\_\_\_\_ Federal ID Number: \_\_\_\_\_  
Address: \_\_\_\_\_ **(REQUIRED)**  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_

**DISTRIBUTION INFORMATION**

Amount to be withdrawn from cash account: \$ \_\_\_\_\_ Commencement Date: \_\_\_\_\_

Withholding Election: I elect to withhold Federal Income Tax at a rate of \_\_\_\_\_ % (not less than 10%)  
(select one) I elect not to have Federal Income tax withheld effective \_\_\_\_\_.

And/Or

Distribute in-kind the follow asset(s): (asset re-registration fees may apply)

Asset Name: \_\_\_\_\_ # shares / \$ amount \_\_\_\_\_  
Asset Name: \_\_\_\_\_ # shares / \$ amount \_\_\_\_\_

**I certify:**

- I am the proper party to direct payment(s) from this IRA and that all information provided by me is true and accurate.
- I have read and understand the distribution conditions on this form and I have met the requirements for making a qualified charitable distribution from my IRA.
- It is my intent to make a qualified charitable distribution from my IRA in cash and/or property under Internal Revenue Code Section 408(d)(8).
- All information provided by me is true and correct and may be relied upon by GoldStar Trust Company.
- I assume full responsibility for this transaction and will not hold GoldStar Trust Company liable for any adverse consequences that may result.
- I expressly assume the responsibility for any adverse tax consequences which may arise from this withdrawal and I agree that GoldStar Trust Company shall in no way be held responsible.

\_\_\_\_\_  
Signature of Account Holder

\_\_\_\_\_  
Date



**GOLDSTAR**  
**TRUST COMPANY**

***IRA CHARITABLE  
DISTRIBUTION REQUEST***

P. O. Box 719  
Canyon, TX 79015  
(800) 486-6888  
Fax (806) 655-2490  
info@goldstartrust.com

RE: IRA CHARITABLE DISTRIBUTION REQUESTS

Dear IRA Holder:

The IRA Charitable Distribution Request form is to be used by IRA holders who have attained age 70 ½ or older as of the date of the distribution. Distributions made from an IRA using this form will be made payable and sent directly to the qualified charitable organization.

Qualified charitable organizations generally include churches, educational institutions, medical organizations, private foundation or other charitable organizations listed under Internal Revenue Code Section 170(b)(1)(A). For more information on qualified charitable organizations, see IRS Publication 526, Charitable Contributions.

**REQUIREMENT:**

**Draft and submit a letter of instruction to the qualified charitable organization of your choice asking for a receipt of your contribution to be sent directly to your address. Your contribution check, along with your letter of instruction, will be sent directly to the organization.**

The reporting of this distribution, at least for now, has not been modified by the IRS and reporting will not differ from any other distributions you may take from your IRA. The individual IRA holder will need to properly report the charitable distribution on his/her taxes. GoldStar Trust Company is not an accounting firm and cannot give tax advice. However, GoldStar Trust Company strongly recommends that you consult a qualified tax advisor or Certified Public Accountant to help you file your tax return correctly.

Please call our Investor Services Department at (800) 486-6888 if you have any questions regarding this matter.

Sincerely,

GoldStar Trust Company