



Northeast Investors Trust
125 High Street, Suite 1802, Boston, MA 02110
Phone 800-225-6704 Fax 617-742-5666

IRA QUALIFIED CHARITABLE DISTRIBUTION REQUEST FORM

CURRENT REGISTRATION: All fields are required.

_____ Name	_____ IRA Account Number
_____ Address	_____ Social Security Number
_____ City, State & Zip Code	_____ Phone Number
_____ Email Address	_____ Date of Birth

CHARITABLE ORGANIZATION INFORMATION: All fields are required.

Charity Name

Address

City, State & Zip Code

Amount of Withdrawal: \$ _____

- Distributions can only be made via check payable directly to the qualified charity.
- The Qualified Charitable Distribution will count toward satisfying your Required Minimum Distribution ('RMD').
- As the Qualified Charitable Distribution is not subject to tax withholding, tax withholding will not be applied to this request.

Important Information on Qualified Charitable Distributions:

It is your responsibility to ensure that all Qualified Charitable Distributions ('QCD') from your IRA are in compliance with the rules set forth by the IRS. Such distributions are reported as an IRA distribution to the IRS and are generally constitute taxable income for you. The maximum allowable QCD is \$100,000.00. You must be age 70 ½ or older as of the date of the distribution. QCD are federally tax free and are limited to the amount that would otherwise be taxed as ordinary income. State tax rules may vary. A QCD made from a Beneficiary IRA will be reported as a Death Distribution and a QCD from a non-beneficiary IRA will be reported as a Normal Distribution on IRS Form 1099-R. Distributions must be paid directly to a qualified 501(c)(3) organization eligible to receive charitable donations. It is strongly suggested that you consult a tax advisor before making a QCD. Unless otherwise instructed, a confirmation letter will be sent to both you and the charity after shares are redeemed. It is your responsibility to request a receipt of your donation from the charity.

Signature **

Date

****For all redemptions over \$25,000, signatures MUST be medallion guaranteed by a bank or trust company, credit union, or other financial institution. Notarization by a Notary Public is NOT acceptable.**

Please place medallion signature guarantee stamp here