



HANAHAU'OLI SCHOOL
EST. 1918

QUALIFIED CHARITABLE DISTRIBUTION REQUEST FORM

Use this form to request a Qualified Charitable Distribution (“QCD” or “IRA Rollover”) from your IRA. Retirement plan participants or their beneficiaries who have attained age 70-1/2 or older may make tax-free distributions from a Traditional or Roth IRA and donate the amount distributed to an eligible tax-exempt charitable organization.

The total of all QCDs for a single tax year cannot exceed \$100,000. The QCD amount can be used toward satisfying your Required Minimum Distribution (“RMD”) for the tax year. The QCD will be reported to the IRS on form 1099-R as a normal distribution (Code 7) based on your age. You must document the tax-free qualification to the Internal Revenue Service on your federal income tax return. Please visit the IRS web site www.irs.gov, or contact a professional tax advisor for more information.

Please contact your Custodian to determine whether you need to indicate which investments should be liquidated to make this distribution, and whether a Medallion guarantee is required. Your custodian may require that its own forms be used to request this distribution.

Request to IRA Custodian:

Mail, fax, or hand-deliver your request to:

Company Name: Hanahau'oli School
1922 Makiki St
Honolulu, HI 96822-2099

Attention: Finance Manager

I. Participant Information – **You must be at least 70-1/2 years old to request a QCD.**

Name: _____

Daytime Telephone: _____

Account Number: _____

Social Security Number: _____

Date of Birth: _____

Type of Account (excluding SEP or SIMPLE IRAs)

- Traditional/Rollover IRA
- Roth IRA
- Beneficiary inherited Traditional IRA
- Beneficiary inherited Roth IRA

II. Distribution Instructions (Complete Sections A and B)

A. Total Distribution Amount (Not to exceed the allowable limit of \$100,000)

Use my calculated RMD amount but not more than \$100,000.

Process a total distribution of \$ _____.

I waive tax withholding on this distribution.

(Any amounts withheld are reportable and taxable.)

B. Please mail or transfer the distribution to the

Hanahau'oli School, Honolulu, Hawaii

1. Amount: \$ _____ or _____ % of the distribution proceeds to:

Lauren Fukuda
Hanahau'oli School
1922 Makiki St
Honolulu, HI 96822-2099

EIN: #99-0074143

Or transfer directly to the account of the above charity:

Bank: Bank of Hawaii
Routing Number: 121301028
Account Name: Hanahau'oli School
Account Number: 0001-012754

Representative contact name and phone number: Helen Chang 808-694-8853

III. Participant Authorization I certify that I am the Participant authorized to make this election and that all information provided is true and accurate. I further authorize the Custodian to release my identity to any charity receiving a QCD hereunder.

Participant's signature:

Date: