**Transfer Instructions for an**

**IRA Charitable Rollover**

**Sample Request Letter from Plan Owner to Administrator for a Charitable Distribution from an IRA**

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Friends:

Current policy permits a rollover directly from an IRA to a qualified public charity. As the owner of IRA account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ that is in the custody of your organization, I request that you transfer from that account the sum of $\_\_\_\_\_\_\_\_\_\_\_\_ to Howard Brown Health Center located in Chicago, Illinois. The federal tax ID number for Howard Brown Health Center is 36-2894128.

Distributions should be made payable to:

Howard Brown Health Center

Attn: Development Department

P.O. Box 13500

Chicago, Illinois 60613

Tax ID# 36-2894128

You can reach Howard Brown Health Center’s Development department by calling 773.572.6988, or by email at dianep@howardbrown.org. In your transmittal to Howard Brown Health Center, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have any questions or need to contact me, I can be reached at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [telephone number or email address]. Thank you for your assistance in this matter.

Sincerely,

[Plan owner]

**Sample Letter from Donor Informing Howard Brown Health of Forthcoming Charitable Distribution from IRA Trustee/Administrator**

Howard Brown Health

Attn: Development Department

P.O. Box 13500

Chicago, Illinois 60613

Dear Friends:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to Howard Brown Health Center in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_ from my plan trustee/administrator, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

 [name of IRA trustee/administrator].

It is my intention to comply with current policy that permits a rollover directly from an IRA to a qualified public charity.

Upon receipt of payment from my trustee/administrator, please send me a written acknowledgement that conforms to IRS requirements. Even though I will receive an acknowledgement of this distribution, I understand that there is no federal charitable income tax deduction for this distribution.

[Optional]: I intend for my gift to Howard Brown to be used for the following purpose: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. [gift designation, if any]

If you have any questions or need to contact me, I can be reached at the following telephone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Sincerely,

[Your name]