**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 Joy Wright (she/her), Director of Development, by calling 872-269-3510 or emailing JoyW@howardbrown.org. In your transmittal to Howard Brown Health, 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 or email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Sincerely,

[Your name]