

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 the Development team for personalized assistance by contacting giving@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]