

IRA CHARITABLE ROLLOVER

Sample Letter

SAMPLE LETTER TEMPLATE: TO THE IRA FUND BROKER/ADMINISTRATOR

(Date)

Name of IRA Custodian/Broker/Administrator

Address

City, State, Zip

RE: Request for Direct Charitable Distribution from Individual Retirement Account

Dear _____(name):

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account number #_____ as provided in the Protecting Americans From Tax Hikes (PATH) Act of 2015, which permits a rollover directly from an IRA to a qualified public charity.

Please issue a direct transfer of funds in the amount of \$_____ (not to exceed \$100,000) payable to the **Shippensburg University Foundation**, which is a public charity and is not a donor-advised fund nor a supporting organization, at the following address:

Shippensburg University Foundation
Attn: Ms. Chrystal Miracle, CPA, CFO
500 Newburg Road
Shippensburg, PA 17257

The Treasury Tax ID Number for the SU Foundation as a public charity is 23-2046093. The dollars are to be designated to support_____fund(s). In your transmittal to the Shippensburg University Foundation, please indicate my name as the donor of record in connection with the transfer. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion for the 20__ tax year.

Thank you for your prompt assistance in this matter.

Sincerely,

Name (Account Owner)

Address

City, State, Zip

Telephone

Shippensburg University
FOUNDATION

500 Newburg Road, SHIPPENSBURG, PA 17257 | SUFoundation.org

*This information is not intended as tax, legal or financial advice. Consult your personal financial advisor for information specific to your situation.

May 2021