

## 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 Sir or Madam:

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 the West Chester Friends School located in West Chester, PA. The federal tax ID number for the West Chester Friends School is #23-1690347.

Distributions should be made payable to:

West Chester Friends School  
Attn: Treasury  
415 North High St.  
West Chester, PA 19380  
Tax ID# 23-1690347

You can reach the West Chester Friends School, Gift Planning by calling Kim Walters at 610-357-6172, or by email at [kwalters@wcfriends.org](mailto:kwalters@wcfriends.org). In your transmittal to the West Chester Friends School, 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 West Chester Friends  
School of Forthcoming Charitable Distribution from IRA  
Trustee/Administrator**

West Chester Friends School  
Attn: Kim Walters, Director of Development  
415 North High St.  
West Chester, PA 19380

To Whom It May Concern:

It is my pleasure to inform you that I have made a distribution from my Individual Retirement Account (IRA) to the West Chester Friends School in the amount of \$ \_\_\_\_\_ from my plan/administrator \_\_\_\_\_ Name \_\_\_\_\_.

Upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by the West Chester Friends School in consideration for this gift. 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 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 or email\_\_\_\_\_.

Sincerely,  
[Your name]