IRA Distribution Letter Template

This one-page letter is pre-filled with the information you need to make a distribution to The Rotary Foundation. Simply add your information, print the letter, and mail to your retirement account provider (address below). Please delete these instructions before printing the letter.

Merrill
P.O. Box 29002
Hot Springs, AR 71903-9002

November 11, 2022
RE: Request for Direct Qualified Charitable Distribution from IRA

Dear IRA administrator:

Please accept this letter as my request to make a direct qualified charitable distribution from my individual retirement account number **[insert number here]** as authorized under Sec. 408(d)(8) of the Internal Revenue Code, as amended.

Please issue a check in the amount of $**[amount]**, payable to The Rotary Foundation of Rotary International and mail it to:

THE ROTARY FOUNDATION
14280 COLLECTIONS CENTER DRIVE CHICAGO, IL 60693

The qualified charitable organization's federal tax identification number is: 36-3245072

In your transmittal to the above-named charitable organization, please memorialize my name and address as the donor of record in connection with this transfer, and copy me on the transmittal at the address below.

It is my intention that this gift complies with IRC 408(d)(8). It is also my intention to have this transfer qualify during this tax year.

If you have any questions or concerns regarding this request, I can be reached at **[Your Phone Number]** or **[Your Email Address]**.

Thank you for your prompt attention to and assistance in this matter.

Sincerely,

[Your First and Last Name]
[Your Address]

[Your City, State ZIP]
[Your Phone Number]