

**Thank you for helping Rotary Do Good in the World  
through a Qualified Charitable Distribution (QCD) from your  
Individual Retirement Account!**

The attached letters will help you make a transfer directly from your IRA.

**Page 1.** Sample request: “From Plan Owner to IRA Administrator”  
Please complete the underlined portions of the attached letter and  
send it to your IRA Plan Administrator to initiate the transfer.

**Page 2.** “From Donor to The Rotary Foundation”  
Upon initiating the transfer, please complete the underlined  
portions from the attached letter and fax or email your notification to:

EMAIL: [vicky.perez@rotary.org](mailto:vicky.perez@rotary.org)

FAX: (847) 556-2181

For assistance please contact Vicky Perez at [vicky.perez@rotary.org](mailto:vicky.perez@rotary.org) or (847) 866-3401.

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**For more information on how Qualified Charitable Distributions,  
also known as IRA “charitable rollover gifts,”  
and other tax-advantaged ways to give can further your  
philanthropic and financial goals, please contact:**

Peter Doetschman, Sr. Planned Giving Officer

**[Planned.Giving@Rotary.org](mailto:Planned.Giving@Rotary.org)**

**(847) 866-3100**

**SAMPLE LETTER REQUEST**  
FROM PLAN OWNER TO IRA ADMINISTRATOR

\_\_\_\_\_  
DATE

\_\_\_\_\_  
IRA PLAN ADMINISTRATOR

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY STATE ZIP CODE

**RE: Request for Qualified Charitable Distribution from my Individual Retirement Account**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ pursuant Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended. I am 70 1/2 years old or older.

Please issue a check in the amount of \$ \_\_\_\_\_ payable to:

**The Rotary Foundation of Rotary International (FEIN 36-3245072)**

And mail it as soon as possible, but to arrive no later than 31 December 2020, to:

**ATTN: Vicky Perez, Sr. Gift Administration Specialist  
The Rotary Foundation  
14280 Collections Center Drive  
Chicago, IL 60693**

In your communication to The Rotary Foundation, please include my name and address as listed below as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have questions, please contact Vicky Perez at (847) 866-3401.

Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_

\_\_\_\_\_  
PRINTED PLAN OWNER NAME ROTARY ID NUMBER

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY STATE ZIP CODE

\_\_\_\_\_  
TELEPHONE NUMBER(S)

