

**Thank you for helping Rotary Do Good in the World  
through a gift from your Individual Retirement Account!**

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

**Page 1.**      “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 send (as addressed) to:

Vicky Perez, Senior Gift Administration Specialist  
1560 Sherman Ave., FN120  
Evanston, IL 60201-3698

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

---

**For more information on how 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  
(Zones 21B, 24, 27, 30, 31, 32, 33 and 34)

Erin Jones, Sr. Planned Giving Officer (Zones 25 and 26)

**[Planned.Giving@Rotary.org](mailto:Planned.Giving@Rotary.org)**  
**(847) 866-3100**

FROM PLAN OWNER TO IRA ADMINISTRATOR

\_\_\_\_\_  
DATE

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

\_\_\_\_\_  
ADDRESS

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

**RE: Request for Charitable Distribution from 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 Dec 2016, to:

**Attn: Vicky Perez, Senior Gift Administration Specialist  
The Rotary Foundation  
1560 Sherman Avenue, FN120  
Evanston, IL 60201-3698**

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)

