
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 # _____ as provided by Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ _____ payable to the organization at the address below:

The Rotary Foundation of Rotary International
FEIN 36-3245072
Kathryn Leisner, Gift Administration Coordinator
1560 Sherman Avenue, FN120
Evanston, IL 60201-3698

In your transmittal 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 Kathryn Leisner at (847) 866-3380.

It is my intention that this transfer qualify for exclusion during the 2007 tax year. Therefore, it is imperative this distribution be postmarked no later than 31 December 2007.

Thank you for your assistance in this matter.

Sincerely,

PRINTED PLAN OWNER NAME

ROTARY ID NUMBER

ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE NUMBER(S)

 DATE

Ms. Kathryn Leisner, Gift Administration Coordinator
 The Rotary Foundation of Rotary International
 1560 Sherman Avenue, FN120
 Evanston, IL 60201-3698

Dear Ms. Leisner:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to The Rotary Foundation of Rotary International in the amount of \$ _____ from my plan trustee/administrator, _____.

NAME OF PLAN TRUSTEE/ADMINISTRATOR

It is my intent to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

Accordingly, 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 your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization, nor will it fund a life income agreement.

I intend that this gift be allocated to: ☐ The Permanent Fund – World Fund; ☐ The Permanent Fund – Share; ☐ The Permanent Fund – Rotary Centers; ☐ The Permanent Fund – Children’s Fund; ☐ The Annual Programs Fund – SHARE; or ☐ other – _____.

Sincerely,

 PRINTED PLAN OWNER NAME

 ROTARY ID NUMBER

 ADDRESS

 CITY

 STATE

 ZIP CODE

 TELEPHONE NUMBER(S)

 E-MAIL ADDRESS/FACSIMILE NUMBER