

# IRA CHARITABLE ROLLOVER

## Sample Email

### **SAMPLE EMAIL TEMPLATE: TO THE IRA FUND BROKER/ADMINISTRATOR**

Dear IRA Custodian,

The Protecting Americans From Tax Hikes (PATH) Act of 2015 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 \$ \_\_\_\_\_ (not to exceed \$100,000) to the **Shippensburg University Foundation**, 1871 Old Main Drive, Shippensburg, PA 17257. The Treasury Tax ID Number for the SU Foundation as a public charity is 23-2046093. The dollars are to be designated to support \_\_\_\_\_ fund(s).

It is my intention to make a Qualified Charitable Distribution (QCD) to the Shippensburg University Foundation from my IRA, which may fulfill part or all of my IRA required minimum distribution (RMD) for this year.

It is my intention to have this transfer qualify for exclusion for the 20\_\_ tax year.

This email is sufficient authorization for you to make this QCD gift. However, if you require any further documents, please promptly e-mail those to me.

Sincerely,

IRA Owner  
Address  
City, State, Zip  
Telephone

**Shippensburg University**  
**FOUNDATION**

1871 OLD MAIN DRIVE, SHIPPENSBURG, PA 17257 | [SUFoundation.org](http://SUFoundation.org)

\*This information is not intended as tax, legal or financial advice. Consult your personal financial advisor for information specific to your situation.

11/15/19