

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**, which is a public charity and is not a donor-advised fund nor a supporting organization, at the following address:

Shippensburg University Foundation
Attn: Ms. Chrystal Miracle, CPA, CFO
500 Newburg Road
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

500 Newburg Road, SHIPPENSBURG, PA 17257 | SUFoundation.org

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

May 2021