

IRA CHARITABLE ROLLOVER

Sample Letter

LETTER TEMPLATE: FROM IRA DONOR TO SU FOUNDATION

(Date)

Shippensburg University Foundation
Attention: Ms. Chrystal Miracle, CPA, CFO
500 Newburg Road
Shippensburg, PA 17257

Dear Ms. Miracle:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account, payable to the **Shippensburg University Foundation**, in the amount of \$_____ from my plan trustee/administrator, (name of the trustee/administrator/broker). The dollars are to be designated to support_____fund(s).

It is my intent to comply with the requirements as provided in the Protecting Americans From Tax Hikes (PATH) Act of 2015 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.

If you have any questions or need to contact me, I can be reached at (telephone).

Sincerely,

Name of Donor (owner of the IRA account)
Address
City, State, Zip
Telephone

Shippensburg University
FOUNDATION

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