**IRA CHARITABLE ROLLOVER**

**Sample Request**

**SAMPLE REQUEST TEMPLATE:** TO THE IRA FUND BROKER/ADMINISTRATOR

RE: Request for Direct Charitable Distribution from an Individual Retirement Account

Dear \_\_\_\_\_\_\_\_\_\_\_\_(name):

Please accept this as my request to make a Qualified Charitable Distribution from my Individual Retirement Account number #\_\_\_\_\_\_\_ as provided in the Protecting Americans from Tax Hikes (PATH) Act of 2015, which permits a rollover directly from an IRA to a qualified public charity.

Please issue a direct transfer of funds in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_ (not to exceed $108,000) payable 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). In your transmittal to the Shippensburg University Foundation, please indicate my name as the donor of record in connection with the transfer. Please copy me on your transmittal.

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

Thank you for your prompt assistance in this matter.

Sincerely,

Name (Account Owner)

Address

City, State, Zip

Telephone

A picture containing clipart

Description automatically generated

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.