

Charitable IRA Rollover Request

IRA Company Name and Address

(Date)

RE: Request for charitable distribution from my Individual Retirement Account for the 20__
Tax Year

Dear IRA Custodian:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account #_____ as authorized by Section 408(d)(8) of the Internal Revenue Code and the Protecting Americans from Tax Hikes Act of 2015.

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

Rudolf Steiner School of Ann Arbor
2230 Pontiac Trail
Ann Arbor, MI 48105

If you want to make an electronic transfer, please contact the Development office at 734-669-9394 x27 for details. In your transmittal to the above-named organization, please communicate my name and address as the donor of record in connection with this transfer.

Also, please indicate that the purpose of the gift is:

- ☐ Annual Fund - supporting faculty professional development and tuition assistance for families
☐ Other designation - as discussed with the Development Office:

Please copy me on your transmittal. It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the 20__ tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20__.

For your reference, the Federal Tax Identification number for the Rudolf Steiner School of Ann Arbor is **38-2242069**.

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

Thank you for your assistance and prompt attention to this matter.

Sincerely,

Signature

Address