



IRA Charitable Rollover Request Sample Letter to Your Plan Provider

[Date]

[Your contact information]

[Your IRA administrator's information]

RE: IRA rollover gift

Dear _____,

Federal legislation now 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 \$_____ to the Mercy Health Foundation, 301 St. Paul Place, Baltimore, MD 21202. The Tax ID Number for the Mercy Health Foundation is 52-2173656.

It is my intention to make a Qualified Charitable Distribution (QCD) to this charity from my IRA, which may fulfill part or all of my IRA required minimum distribution for this year. This letter is sufficient authorization for you to make this QCD gift. However, if you require any further documents, please promptly send or preferably email *[your email address]* those to me.

Thank you for your assistance with this matter.

Cordially yours,

[Your name]

[Phone number]

Mercy Health Foundation, Inc. is the corporate entity which receives and manages philanthropic support for Mercy Medical Center and Stella Maris.