

**Thank you for helping Rotary Do Good in the World
through a gift from your Individual Retirement Account!**

The attached letters will help you make a transfer directly from your IRA.

Page 1. “From Plan Owner to IRA Administrator”
Please complete the underlined portions of the attached letter and
send it to your IRA Plan Administrator to initiate the transfer.

Page 2. “From Donor to The Rotary Foundation”
Upon initiating the transfer, please complete the underlined
portions from the attached letter and send (as addressed) to:

Vicky Perez, Senior Gift Administration Specialist
1560 Sherman Ave., FN120
Evanston, IL 60201-3698
FAX: (847) 556-2181

For assistance please contact Vicky Perez at vicky.perez@rotary.org or (847) 866-3401.

**For more information on how IRA “charitable rollover gifts”
and other tax-advantaged ways to give can further your
philanthropic and financial goals, please contact:**

Peter Doetschman, Sr. Planned Giving Officer

Planned.Giving@Rotary.org
(847) 866-3100

FROM PLAN OWNER TO IRA ADMINISTRATOR

DATE

IRA PLAN ADMINISTRATOR

ADDRESS

CITY STATE ZIP CODE

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ pursuant Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended. I am 70 1/2 years old or older.

Please issue a check in the amount of \$ _____ payable to:

The Rotary Foundation of Rotary International (FEIN 36-3245072)

And mail it as soon as possible, but to arrive no later than 31 Dec 2019, to:

**Attn: Vicky Perez, Senior Gift Administration Specialist
The Rotary Foundation
1560 Sherman Avenue, FN120
Evanston, IL 60201-3698**

In your communication to The Rotary Foundation, please include my name and address as listed below as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have questions, please contact Vicky Perez at (847) 866-3401.

Thank you for your assistance in this matter.

Sincerely,

PRINTED PLAN OWNER NAME ROTARY ID NUMBER

ADDRESS

CITY STATE ZIP CODE

TELEPHONE NUMBER(S)

