



Sample letter directing a Charitable IRA rollover to the Intervale Center

This charitable IRA rollover to the Intervale Center should be delivered to:

Intervale Center
Attn: Karen Jamiel, Donor Relations Manager
180 Intervale Rd.
Burlington, VT 05401

Name and Address of IRA Custodian or Trustee:

RE: Charitable IRA Rollover – distribution to the Intervale Center

Dear Custodian or Trustee:

I hereby direct you to make a qualified charitable distribution (a ‘charitable IRA rollover’) of \$_____ to the Intervale Center, a 501(c)(3) public charity that is qualified to receive charitable IRA rollovers under the provisions of the Protecting Americans from Tax Hikes Act of 2015 (the “PATH” Act, extending section 1201 of Public Law 109-280). This rollover should be made from the _____ (name on IRA account), account number _____. It is my intent to make this charitable IRA rollover for tax year 20___. I further represent as follows:

- 1) I am 70 1/2 years old or older. My date of birth is: _____
- 2) I will not receive any benefits from the Intervale Center as a result of this rollover. This rollover is not directed to a charitable remainder trust, lead trust, gift annuity, pooled income fund, donor advised fund, supporting organization, family foundation, or other non-qualified use of a charitable IRA rollover.
- 3) I understand that a charitable IRA rollover is limited to no more than \$100,000 in total from my IRA or all of my IRAs combined.
- 4) I will not incur any federal income tax liability as a result of this rollover, therefore I elect out of withholding this rollover. I will not accept any personal distribution of funds intended for this charitable IRA rollover.

Thank you for your prompt attention to this matter. Please contact me immediately with any questions or the reasons for any substantial delay in completing this rollover.

Sincerely,

Donor’s name as listed on the IRA

Print Name