

**Thank you for helping Rotary Do Good in the World
through a Qualified Charitable Distribution (QCD) from your
Individual Retirement Account!**

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

Page 1. Sample request: “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 fax or email your notification to:

EMAIL: vicky.perez@rotary.org

FAX: (847) 556-2181

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

**For more information on how Qualified Charitable Distributions,
also known as IRA “charitable rollover gifts,”
and other tax-advantaged ways to give can further your
philanthropic and financial goals, please contact your
Planned Giving Officer:**

Planned.Giving@Rotary.org

(847) 866-3100

SAMPLE LETTER REQUEST
FROM PLAN OWNER TO IRA ADMINISTRATOR

DATE

IRA PLAN ADMINISTRATOR

ADDRESS

CITY STATE ZIP CODE

RE: Request for Qualified Charitable Distribution from my 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 December 2021, to:

**ATTN: Vicky Perez, Sr. Gift Administration Specialist
The Rotary Foundation
14280 Collections Center Drive
Chicago, IL 60693**

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)

FROM DONOR TO THE ROTARY FOUNDATION

DATE

Vicky Perez, Sr. Gift Administration Specialist
The Rotary Foundation
vicky.perez@rotary.org
FAX: 847-556-2181

Dear Ms. Perez:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to The Rotary Foundation of Rotary International in the amount of \$ _____ from my plan trustee/administrator,

(NAME OF PLAN TRUSTEE/ADMINISTRATOR)

It is my intent to comply with Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift. Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization, nor will it fund a life income agreement.

I intend that this gift be allocated to:

- | | |
|--|---|
| <input type="checkbox"/> Endowment Fund – World Fund | <input type="checkbox"/> Annual Fund – World Fund |
| <input type="checkbox"/> Endowment Fund – SHARE | <input type="checkbox"/> Annual Fund – SHARE |
| <input type="checkbox"/> Endowment Fund – Rotary Peace Centers | <input type="checkbox"/> Area of Focus _____ |
| <input type="checkbox"/> PolioPlus | <input type="checkbox"/> Other, to be discussed. |

Gifts to Annual Fund or PolioPlus are eligible for Paul Harris Fellow recognition

Sincerely,

PRINTED PLAN OWNER NAME

ROTARY ID NUMBER

ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE NUMBER(S)

E-MAIL ADDRESS/FACSIMILE NUMBER