

Date

SAMPLE LETTER TO IRA CUSTODIAN

Name of IRA Custodian  
Address  
City, State, Zip Code

Dear Name:

It is my intention to make a Qualified Charitable Distribution (QCD) to the SIUE Foundation from my IRA as permitted by law. This QCD will fulfill part or all of my IRA required minimum distribution for this year.

Please make a direct distribution from my Individual Retirement Account # \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ to the SIUE Foundation (Fed. Tax ID: 37-1019805).

Make the check payable to "SIUE Foundation." Please include my name and the following designation(s) in the memo line or include a copy of this letter with the check.

Designation(s) of my gift:

Fund Name: \_\_\_\_\_ Fund Number: \_\_\_\_\_ Amount: \_\_\_\_\_  
Fund Name: \_\_\_\_\_ Fund Number: \_\_\_\_\_ Amount: \_\_\_\_\_  
Fund Name: \_\_\_\_\_ Fund Number: \_\_\_\_\_ Amount: \_\_\_\_\_

Mail to:

SIUE Foundation  
Campus Box 1082  
Edwardsville, IL 62026-1082

I further affirm as follows:

\_\_\_ I am age 70 ½ or older. Date of birth (mm/dd/yyyy) \_\_\_\_\_

\_\_\_ I will not accept any personal distributions of funds intended for this charitable IRA rollover.

Thank you for your prompt attention to this matter.

Sincerely,

\_\_\_\_\_

Print Name

Date \_\_\_\_\_

**Notes:**

*A direct rollover distribution to the SIUE Foundation is permitted by The Protecting Americans from Tax Hikes (PATH) Act of 2015, which makes the Charitable IRA Rollover permanent.*

*The maximum gift amount is \$100,000 per person (\$200,000 per couple) per year from my IRA or from all of my combined IRAs (traditional and Roth).*