

Transfer Instructions for an IRA Charitable Rollover

*Sample Request Letter from Plan Owner to Administrator
for a Charitable Distribution from an IRA*

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Current policy 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 Colossian Forum (TCF) at 601 Fifth St. NW, Suite 101, Grand Rapids MI, 49504. The Federal Tax ID number for TCF is 27-4553768.

Distributions should be made payable to:

The Colossian Forum
601 Fifth St. NW, Suite 101
Grand Rapids MI, 49504

You can reach The Colossian Forum's Director of Development, Jan Stump, at (w) 616-328-6016 Ext. 4, (c) 719-659-7808, or jstump@colossianforum.org. In your transmittal to The Colossian Forum, please include my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

If you have any questions please contact me at _____ [telephone number or email address]. Thank you for your assistance in this matter.

Sincerely,

[Plan Owner]