

SAMPLE LETTER FOR AN IRA ROLLOVER REQUEST. PLEASE RETAIN THIS LETTER WITH YOUR IMPORTANT TAX DOCUMENTS.

(Date)  
(IRA Administrator/Broker/Mutual Fund Group/Custody Agent)  
(Name)  
(Address)  
(City, State, ZIP Code)

RE: IRA Charitable Rollover for the Tax Year **20XX**

Dear Sir/Madam,

I wish to make a charitable distribution directly from my Individual Retirement Account (# \_\_\_\_\_) to Ability Connection Colorado, Federal Tax ID #. Please transfer \$ \_\_\_\_\_ (maximum \$100,000) to Ability Connection Colorado in full or partial satisfaction of my minimum required distribution for **20XX**, and complete this transfer before December 31. The qualified charitable distribution should be made directly to Ability Connection Colorado.

Ability Connection Colorado is a qualified organization to receive this IRA charitable gift, and is neither a donor advised fund nor a supporting organization. No goods or services will be provided in exchange for this contribution. In your transmittal to Ability Connection Colorado, please reference my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. If you have any questions, please call me or Judy Ham, President and CEO of Ability Connection Colorado, at (303) 226.5536.

Thank you.

Sincerely,

Donor Phone Number  
Street Address Apartment Number  
City State Zip