

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: Request for Charitable Distribution from Individual Retirement Account

Account # _____

Dear Sir or Madam,

Please accept this letter as my request to make a direct charitable distribution from the account referenced above. Please issue a check in the amount of \$_____ (not to exceed \$100,000) payable to Ability Connection Colorado. Please mail the check directly to this organization at the following address: 801 Yosemite Street Denver, Colorado 80238. In your transmittal Ability Connection Colorado, please give my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. It is my intention to have this transfer qualify for exclusion from taxable income during the **20XX** tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, **20XX**. If you have any questions or need to contact me, I can be reached at (telephone).

Thank you for your assistance in this matter.

Sincerely,

Donor Phone Number
Street Address Apartment Number
City State Zip