

# **SAMPLE - DONOR NOTICE TO CHARITY RE IRA ROLLOVER**

**(Sent from Donor Notifying Charity that Gift Will be Coming)**

DATE:

University of Georgia Foundation  
Office of Gift and Estate Planning  
Attn:  
Athens, GA 30602

Subject: IRA Rollover Gift for

Dear:

I am pleased to inform you that I have directed the custodian of my Individual Retirement Account (“IRA”) to make a qualified charitable distribution from my IRA to the University of Georgia Foundation. The information concerning my IRA and my gift are described below.

IRA Plan Trustee/Administrator Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Distribution Amount: \_\_\_\_\_

Comments: \_\_\_\_\_

It is my intention that: (1) this gift from IRA comply with the “qualified charitable distribution” requirements of Section 408(d)(8) of the Internal Revenue Code; (2) that this gift will be used to satisfy all or part of my annual required minimum distribution; and (3) that I will not be able to claim a charitable income tax deduction for my IRA gift.

When you receive the distribution from the trustee/administrator of my IRA, please send me a contemporaneous written acknowledgement that includes the following: (1) information about the amount of my gift; (2) a statement confirming that no goods or services were transferred to me in consideration for this gift; and (3) that indicates that my gift will not be placed in a donor advised fund or supporting organization.

If you have any questions concerning my gift or this letter, please let me know.

Sincerely,

Donor’s Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_