Thank you for your support of
The Rotary Foundation of Rotary International
by directly transferring assets in your Individual Retirement Account!

To facilitate the process, please use the attached letters.

Page 1. "From Plan Owner to IRA Administrator"
Please complete the underlined portions of the attached letter and send it to your IRA Plan Administrator to initiate the transfer.

Page 2. "From Donor to The Rotary Foundation"
Upon initiating the transfer, please complete the underlined portions from the attached letter and send (as addressed) to:

Vicky Perez, Senior Gift Administration Specialist
1560 Sherman Ave., FN120
Evanston, IL 60201-3698

For more information, please contact:

Nancy Hoffman, Planned Giving Officer 847-866-3488 for Zones 21, 27-29, 32-34

Peter Doetschman, Sr. Planned Giving Officer 847-866-3833 for Zones 25-26, and 30-31

Karena Bierman, Director of Gift Planning, at 847-866-3100

_____
DATE

_____
IRA PLAN ADMINISTRATOR

_____
ADDRESS

_____
CITY STATE ZIP CODE

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ pursuant Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended. I understand that the charitable IRA rollover provisions are not currently in place however I wish to make a direct transfer in the event that new legislation is passed this year and made retroactive.

Please issue a check in the amount of $ _____ payable to:

The Rotary Foundation of Rotary International
FEIN 36-3245072

And mail it as soon as possible, but to arrive no later than 31 Dec 2015, to:

Attn: Vicky Perez, Senior Gift Administration Specialist
The Rotary Foundation
1560 Sherman Avenue, FN120
Evanston, IL 60201-3698

In your communication to The Rotary Foundation, please include my name and address as listed below as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have questions, please contact Vicky Perez at (847) 866-3401.

Thank you for your assistance in this matter.

Sincerely,

_____

_____
PRINTED PLAN OWNER NAME ROTARY ID NUMBER

_____
ADDRESS

_____
CITY STATE ZIP CODE

_____
TELEPHONE NUMBER(S)

_____
DATE

Vicky Perez, Senior Gift Administration Specialist
1560 Sherman Avenue, FN120
Evanston, IL 60201-3698

Dear Ms. Perez:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to The Rotary Foundation of Rotary International in the amount of $ _____ from my plan trustee/administrator,

_____.
NAME OF PLAN TRUSTEE/ADMINISTRATOR

It is my intent to comply with Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift. I understand that the charitable IRA rollover provisions are not currently in place however I wish to make a direct transfer in the event that new legislation is passed this year and made retroactive.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization, nor will it fund a life income agreement.

I intend that this gift be allocated to:

☐ Endowment Fund – World Fund; ☐ Endowment Fund – Share; ☐Endowment Fund – Rotary Peace Centers; ☐ Annual Fund – SHARE; ☐ PolioPlus or ☐other, to be discussed.

Sincerely,

_____

_____
PRINTED PLAN OWNER NAME ROTARY ID NUMBER

_____
ADDRESS

_____
CITY STATE ZIP CODE

_____
TELEPHONE NUMBER(S)

_____
E-MAIL ADDRESS/FACSIMILE NUMBER