

Sample Transfer Instruction Letters for Qualified IRA Gifts to The Aloha Foundation

Letter 1: Sample Request from IRA Account Owner (Donor) to IRA Administrator 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 # [Account Number].

Please send me the appropriate forms to issue a check or wire transfer from my IRA account in the amount of \$ _____ payable to The Aloha Foundation, (tax identification number 03-6016791), as follows:

For payment by check, mail to:

The Aloha Foundation
Attn: Andy Hilton
Development Office
2968 Lake Morey Road
Fairlee, VT 05045

In your transmittal to The Aloha Foundation, please reference my name and address as the donor of record, and copy me on your transmittal.

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,
[IRA Account Owner]

Letter 2: Sample Letter from Donor Informing The Aloha Foundation of Forthcoming Qualified Charitable Distribution from IRA Administrator

The Aloha Foundation
Attn: Andy Hilton
Development Office
2968 Lake Morey Road
Fairlee, VT 05045

Dear Andy:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to The Aloha Foundation in the amount of \$ _____ from my plan trustee/administrator, [name and contact number for IRA Administrator]. This gift is to be allocated towards [the Aloha Annual Fund/ _____ endowment fund/capital purpose].

Accordingly, upon your receipt of payment from my custodian/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift and that no goods or services were provided to me by The Aloha Foundation in consideration for this gift.

If you have any questions or need to contact me, I can be reached at [telephone].

Sincerely,
[Donor name]