Letter of Instruction for Charitable IRA Distribution to Penn State Hillel

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Owner/Donor Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, Zip

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of IRA Custodian

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, Zip

Dear IRA Custodian, Trustee or Plan Administrator:

This letter requests a charitable distribution from my Individual Retirement Account (IRA), Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. This distribution is intended to be a Charitable IRA Rollover, as authorized by Section 408(d)(8) of the Internal Revenue Code.

Please transfer the sum of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ payable to Hillel: The Foundation for Jewish Campus Life (hereinafter “Penn State Hillel”) at the address as follows:

Penn State Hillel

Attn: Lori Thompson-Given

115 Pasquerilla Spiritual Center

University Park, PA 16802

Penn State Hillel is a qualified charitable recipient. Its Federal Tax ID Number is 38-3829311. It is my intention for this transfer to be a Qualified Charitable Distribution that will qualify for exclusion from my taxable income during the 20\_\_\_ tax year.

These funds are to be used for the purpose marked with an X on the line below:

\_\_\_\_ I would like to give to the Penn State Hillel Annual Fund (area of greatest need and impact)

\_\_\_\_ Penn State Hillel Capital gift (To our new home downtown)

**Important:** In your transmittal to Penn State Hillel, please include my name and address as the donor of record. I would appreciate confirming documentation. If you have any questions or concerns regarding this request, please contact me at\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Your name as listed on IRA