



OKLAHOMA CITY
COMMUNITY FOUNDATION
Helping you help the community

Sample Direction Letter for:
Charitable IRA Rollover Request to Plan Administrator

Donor Address and Contact Information: _____

Date: _____

IRA Custodian Firm, Contact, and Address: _____

This letter serves as my request to make a qualified charitable distribution from my individual retirement account [Insert number here] as permanently extended by the Protecting Americans from Tax Hikes (PATH) Act of 2015.

Please issue the distribution in the amount of \$ _____ to the Oklahoma City Community Foundation.

DISTRIBUTION BY CHECK

Mail to:

Oklahoma City Community Foundation
PO Box 1146
Oklahoma City, OK 73101-1146

or

DISTRIBUTION BY WIRE TRANSFER

MidFirst Bank
ABA 303087995
Acct. 5201019082
FCO Donor Name

In your transmittal to the Oklahoma City Community Foundation, please indicate my name as the IRA owner of record in connection with this transfer.

For your reference, the Federal Tax Identification number for the Oklahoma City Community Foundation is 23-7024262.

Please contact me by: phone: _____ email: _____
should you have any further questions to fulfill this request.

Sincerely,

Print Name: _____

Signature: _____