

# Sample Letter for Transfer Instructions for an IRA Charitable Rollover

To: [Plan Administrator]

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Current policy permits a rollover directly from an IRA to a qualified public charity. As the owner of IRA account # \_\_\_\_\_ that is in the custody of your organization, I request that you transfer from that account the sum of \$ \_\_\_\_\_ to Silent Spring Institute located in Newton, Massachusetts. The federal tax ID number for Silent Spring Institute is 04-3237106.

Distributions should be made payable to:

Silent Spring Institute  
Attn: Gift Planning  
320 Nevada Street, Suite 302  
Newton, MA 02460  
Tax ID# 04-3237106

You can reach Silent Spring Institute's Gift Planning department by calling (617) 332-4288, or by email at [sarvey@silentspring.org](mailto:sarvey@silentspring.org).

In your transmittal to Silent Spring Institute, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_ [telephone number or email address]. Thank you for your assistance in this matter.

Sincerely,  
[Plan owner]