

**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:

Hannah Fenley, Gift Administration Coordinator  
1560 Sherman Ave., FN120  
Evanston, IL 60201-3698

**For more information, please contact  
Hannah Fenley, Gift Administration Coordinator, at (847) 866-3380.**

\_\_\_\_\_  
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 # \_\_\_\_\_ as provided by Sec. 504 of the Emergency Economic Stabilization Act of 2008, Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ \_\_\_\_\_ payable to the organization at the address below:

**The Rotary Foundation of Rotary International  
FEIN 36-3245072  
Hannah Fenley, Gift Administration Coordinator  
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 Hannah Fenley at (847) 866-3380.

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

Hannah Fenley, Gift Administration Coordinator  
1560 Sherman Avenue, FN120  
Evanston, IL 60201-3698

Dear Ms. Fenley:

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 the requirements of Sec. 504 of the Emergency Economic Stabilization Act of 2008, Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

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: The Permanent Fund – World Fund;  
The Permanent Fund – Share; The Permanent Fund – Rotary Centers;  
The Annual Programs Fund – SHARE; or other  
\_\_\_\_\_.

Sincerely,

\_\_\_\_\_

\_\_\_\_\_  
PRINTED PLAN OWNER NAME ROTARY ID NUMBER

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY STATE ZIP CODE

\_\_\_\_\_  
TELEPHONE NUMBER(S)

\_\_\_\_\_  
E-MAIL ADDRESS/FACSIMILE NUMBER