

IRA CHARITABLE ROLLOVER



Sample Request from Donor to IRA Plan Administrator

Date: _____

To:

Dear _____:

I request that you make a direct charitable distribution from my Individual Retirement Account number _____ to Des Moines University. It's my understanding that a charitable distribution is allowed by Title II, Section 208 of H.R. 8 – the Taxpayer Relief Act of 2016 (or "ATRA") and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ _____ payable to Des Moines University at the following address:

Des Moines University
Attn: Accounting
8025 Grand Ave
West Des Moines, IA 50266

The tax identification number of Des Moines University is 42-0730347.

In your transmittal documents to Des Moines University, please include my name and address as the donor of record. Please copy me on your transmittal.

It is my intention to have this distribution qualify for exclusion as allowed by applicable federal law H.R. 8 – the IRA charitable rollover was part of signed legislation on December 18, 2015, that includes a permanent extension. This distribution must be postmarked no later than December 31st of the intended tax year.

If you have any questions regarding this request, please contact me at the following phone number

_____.

Thank you for your attention to this request.

Sincerely,

Signature

Date

Printed Name

Address: street, city, state, zip

Please return this form to your IRA Plan Administrator.
Do not send this form to Des Moines University.

*Please note that some Plan Administrators may require a Notary Public Signature or a Medallion Signature Guarantee