

IRA Charitable Rollover Request

If you are requesting an IRA charitable distribution by check, you may use the sample letter below to submit your request to your IRA Administrator. Please note that the date of your gift is the DATE OF THE POSTMARK ON THE ENVELOPE from your IRA Administrator. For gift administrative purposes, please forward a copy of your letter below to the Alverno College Advancement Office. Please send a copy of the request to your IRA Administrator to the address below.

SAMPLE LETTER TEXT

<Date>

<Address of your IRA Administrator>

Dear Sir or Madam,

Please accept this letter as authorization to make a charitable distribution from my Individual Retirement Account # _____.

Please issue a check made payable to Alverno College (EIN 39-0806263) in the amount of \$_____. The check should be sent to:

Alverno College
Gift Processor
Advancement Office
3400 S. 43rd Street
P.O. Box 343922
Milwaukee WI 53234-3922

Alverno College's tax identification # is 39-0806263

In your transmittal to Alverno, please include my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. It is my intention that this transfer will qualify for exclusion from my taxable income during the _____ tax year. Therefore, it is imperative that this distribution be delivered to Alverno no later than December 31, _____.

The funds are to be used for _____.

If you have any questions or need to contact me, I can be reached at _____. Thank you for your prompt assistance in this matter.

Sincerely,

<Signature of the IRA Owner>

Cc: Advancement Office, Alverno College