

## IRA Transfer Form

Sample letter of Instruction from Donor to IRA Plan Provider

[Date]

[Name of Plan Provider]

[Address]

[City, State, Zip]

Re: Request for Direct Charitable Distribution from Individual Retirement Account (IRA)

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable contribution from my Individual Retirement Account Number: [insert account number]

as provided by the Tax Relief Prevention Act.

Please issue a check in the amount of \$\_\_\_\_\_ payable to Presbyterian Senior Living or one of its communities (a 501 (c)(3) charitable organization, EIN 23-1381404 at the following address:

Presbyterian Senior Living  
Office of Mission Support  
1Trinity Drive East  
Suite 201  
Dillsburg, PA 17019

In your transmittal to the organization, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the 2015 tax year. Therefore, it is imperative that this distribution be postmarked no later that December 31, 2015.

If you have any questions or concerns regarding this request, I can be reached at [phone number and email address.]

Thank you for your prompt attention to and assistance with the matter.

Sincerely,

[Donor Name]