



COMMUNITY FOUNDATION
OF COLLIER COUNTY
FOR GOOD. FOREVER.

Sample Direction Letter for:

Charitable IRA Rollover Request to Plan Administrator

Donor Address and Contact Information: _____

Date: _____

IRA Custodian Firm, Contact, and Address: _____

This letter serves as my request to make a qualified charitable distribution from my individual retirement account [Insert number here] as permanently extended by the Protecting Americans from Tax Hikes (PATH) Act of 2015.

Please issue the distribution in the amount of \$_____ to the Community Foundation of Collier County.

DISTRIBUTION BY CHECK

Mail to: Community Foundation of Collier County
1110 Pine Ridge Road, Ste 200
Naples, FL 34108

or

DISTRIBUTION BY WIRE TRANSFER

Broker: Morgan Stanley Wealth Management – c/o Stacey F. Brown - Fax: 239-217 -4085
DTC Clearing #: 0015
FBO: Account 525-106836-0-252 - Community Foundation of Collier County
Federal Tax Number 59-2396243
FCO Donor Name _____

In your transmittal to the Oklahoma City Community Foundation, please indicate my name as the IRA owner of record in connection with this transfer.

Please contact me by: phone: _____ email: _____ should you have any further questions to fulfill this request.

Sincerely,

Print Name: _____

Signature: _____