

Sample IRA Custodian Letter

Date

Dear IRA Custodian,

The **Protecting Americans from Tax Hikes Act of 2015**, signed by the President on December 18, 2015, permits a rollover directly from an IRA to a qualified public charity. As the owner of IRA account # _____ that is in the custody of your organization, I request that you transfer from that account the sum of \$ _____ to **OSF Healthcare System**, FEIN # 37-0813229. I request a notation be added that my gift is to be used to support _____.
(OSF Medical Center/Hospital or Program)

To mail a check, please mail to:

OSF Healthcare Foundation
ATTN: Micki McCarthy
530 NE Glen Oak Avenue
Peoria, IL 61637

For Wire or ACH transfers:

Please contact Micki McCarthy, Director of Planned Giving, (309) 566-5653 to make a Qualified Charitable Distribution transfer directly to **OSF Healthcare System**.

It is my intention to make a Qualified Charitable Distribution (QCD) to **OSF Healthcare System** from my IRA, which may fulfill part or all of my IRA required minimum distribution for this year.

This letter is sufficient authorization for you to make this QCD gift. However, if you require any further documents, please contact me at _____.

Thank you.

IRA Owner