

**IRA CHARITABLE ROLLOVER  
THE CIRCLE SCHOOL**

**Date:** \_\_\_\_\_

**To (your IRA administrator):** \_\_\_\_\_

**Re: Request for Charitable Distribution from Individual Retirement Account**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ as provided by the Sec. 1201 of the Pension Protection Act of 2006 (as extended by the Emergency Economic Stabilization Act) and Sec. 408(d)(8) Of the Internal Revenue Code of 1986, as amended.

Please sell \_\_\_\_\_ fund/ \_\_\_\_\_ securities to generate the cash for this qualified distribution.

Please issue a check in the amount of \$ \_\_\_\_\_ (not to exceed \$100,000) payable to:

For ACH direct deposit, contact The Circle School (717-564-6700) for our bank account and routing numbers.

**The Circle School Corporation (legal name) (Tax I.D. #23-230-4696)**

% Development Officer  
727 Wilhelm Road  
Harrisburg, PA 17111

In the event you have any questions, you can reach the school's Development Officer through the school office or by email at [office@circleschool.org](mailto:office@circleschool.org) or [financial@circleschool.org](mailto:financial@circleschool.org).

In your transmittal to The Circle School, please give my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion during the \_\_\_\_\_ tax year. If you have any questions or need to contact me, I can be reached at \_\_\_\_\_. Thank you for your assistance.

Sincerely,

\_\_\_\_\_  
IRA Owner

\_\_\_\_\_  
IRA Owner Address