



IRA Sample Letter of Instruction

To: IRA Administrator or Custodian

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account (IRA), Account # _____. This distribution is intended to be an IRA Charitable Rollover, as authorized by Section 408(d)(8) of the Internal Revenue Code.

Please issue a check in the amount of \$ _____ payable to the CaroMont Health Foundation and send the check to the following address:

CaroMont Health Foundation
Attn: Mary Grace Bean
2525 Court Drive
Gastonia, NC 28054

For information about donating by ACH payment, please contact foundation@caromonthealth.org.

The CaroMont Health Foundation's tax ID # is: 56-1479699 and is a qualified charitable recipient for this transfer. It is my intention to have this transfer be a Qualified Charitable Distribution that will qualify for exclusion from my taxable income during the 20____ tax year.

Important:

In your transmittal to the CaroMont Health Foundation, please indicate my name and address as the donor of record in connection with this transfer, and please copy me on your transmittal.

If you have any questions I can be reached at _____. Thank you for your assistance in this matter.

Sincerely,
