



IRA ROLLOVER INSTRUCTIONS TO PLAN ADMINISTRATOR

TO: Your Plan Administrator _____

FROM: Plan Owner _____

ADDRESS: _____

EMAIL: _____ **PHONE:** _____

ACCOUNT #: _____ **DATE:** _____ **Request**

RE: For Charitable Distribution from Individual Retirement Account

HR 2029, the Consolidated Appropriations Act of 2016 and Sec. 408(d)(8) of the Internal Revenue Code of 1986 permits an IRA rollover at age 70 ½ or greater direct from an IRA custodian 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 \$ _____.

Via Check:

Please issue a check in the following amount of \$ _____ payable to:

CalWild (Tax ID #51-0183228)

Mail check to:

CalWild
4900 Shattuck Avenue, #22627
Oakland, CA 94609

Please accept this form as my request to make a direct charitable distribution from my IRA. In your transmittal to the charity, please memorialize my name and address as the donor of record in connection with the transfer. Please copy me on your transmittal.

If you have any questions or need to contact me, I can be reached at the information listed above.

Sincerely,

Signature

CalWild

4900 Shattuck Avenue, #22627 • Oakland, CA 94609

510.451.1450 • info@calwild.org • CalWild.org