
Date

Name of IRA Custodian

Address

City, State, Zip

Re: Charitable IRA Distribution to Case Western Reserve University

Dear IRA Custodian, Trustee or Plan Administrator:

As the owner of IRA account number _____ that is in your custody, I request that you transfer the sum of \$ _____ to Case Western Reserve University as an IRA charitable rollover (referred to as a "qualified charitable distribution" in Section 408(d)(8) of the Internal Revenue Code). This payment should be sent to:

Office of Advancement Services
Case Western Reserve University
10900 Euclid Avenue
Cleveland, Ohio 44106-7035

The Federal Tax ID Number for Case Western Reserve is 34-1018992.

For ACH, wire or other electronic transfer instructions, please contact Keith Rohr at 216.368.4660 or keith.rohr@case.edu.

These funds are to be used for the purpose marked with an X on the line below:

_____ This gift is unrestricted and may be used in an area of greatest need.

_____ I would like to give to the President's Strategic Initiatives Fund

_____ I would like to give to _____

(Please specify a school, college or other area of the university)

_____ Other _____

(Specify purpose such as scholarship fund, endowment fund, unrestricted use, etc.)

In your transmittal letter to Case Western Reserve University, please include my name and address as the donor of record. I would appreciate a copy of your correspondence.

If you have any questions or concerns regarding this request, please contact me at _____.

Sincerely,

(Your name as listed on IRA)