

Sample IRA Custodian Letter for Qualified Charitable Distributions

PLEASE NOTE: OSF HealthCare Foundation is a supporting organization for the OSF HealthCare System. In order to meet the requirements set forth by Congress and the IRS, Qualified Charitable Distributions must be made to **OSF HealthCare System**. You may designate the area of our OSF Ministry you wish to support with your gift.

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, up to \$100,000 per year per individual IRA owner. The amount I rollover directly to a qualified public charity will count towards my RMD, to the extent the RMD has not already been taken.

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

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 calendar 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

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 Kim Rapp, Senior Financial Analyst for OSF HealthCare Foundation at (309) 683-9318 for instructions.