



## ST. TERESA'S ACADEMY

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### IRA Gift Transfer Instructions

To help you facilitate a gift through IRA transfer, please use the following instructions. If you have a specific question, please contact Megan Schaefer at 816-501-0011 x234.

#### Step 1: INITIATE TRANSFER

It is necessary for you to contact your IRA Plan Administrator to initiate the transfer. Please check with your plan administrator or your plan website to see if there are special instructions or forms. In order to provide your Administrator with the proper language and instructions for successful transfers, you may use our Sample Request Letter to the IRA Administrator.

To qualify for the tax break, the money **must be transferred directly from the IRA to the charity**. Some plans may require you to sign a written IRA distribution form specifying a “special payee” in order to make the check out directly to the charity. The check should be mailed directly to **St. Teresa's Academy**.

#### Step 2: NOTIFY THE FOUNDATION

Once the transfer instructions have been communicated to the IRA Plan Administrator, it is important that you provide St. Teresa's Academy with information about your gift for audit and acknowledgment purposes. You may use our Sample Letter to inform the Academy of the transfer and mail to:

Megan Schaefer  
Director of Development & Marketing  
St. Teresa's Academy  
5600 Main Street  
Kansas City, MO 64113

Date \_\_\_\_\_

**Sample Request Letter to the IRA Administrator**

IRA Company Name and Address:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**RE: Request for Direct Charitable Distribution from IRA**

Dear Sir or Madam:

Please accept this letter as my request to make a direct qualified charitable distribution from my individual retirement account # \_\_\_\_\_ .

Please issue a check in the amount of \$\_\_\_\_\_ payable to St. Teresa's Academy and mail it to the following address. (St. Teresa's Federal Tax ID number is: 53-0196617):

Megan Schaefer  
Director of Development & Marketing  
St. Teresa's Academy  
5600 Main Street  
Kansas City, MO 64113

In your transmittal to St. Teresa's Academy, please include my name and address as the donor of record in connection with this distribution. Also, please indicate that the purpose is for:

\_\_\_\_\_  
(Examples: where most needed, Academy Fund, scholarships, etc.)

It is my intention that this distribution qualify for exclusion from my taxable income during the 2019 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2019. Please copy me on your transmittal.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_. Thank you for your prompt attention to and assistance in this matter.

Sincerely,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Address)

Date \_\_\_\_\_

**Sample Letter to Inform St. Teresa's Academy**

Megan Schaefer  
Director of Development & Marketing  
St. Teresa's Academy  
5600 Main Street  
Kansas City, MO 64113

Dear Mrs. Schaefer,

I have written (IRA administrator) \_\_\_\_\_  
to request a direct charitable distribution from my individual retirement account in the amount of  
\$\_\_\_\_\_ to be sent directly to St. Teresa's Academy to be used for (Designation/Purpose):  
\_\_\_\_\_

I would appreciate a written confirmation when you have received the funds. I understand that I will  
not receive a federal income tax deduction for making this charitable distribution.

Thank you for your attention to this matter. If you have any questions, please contact me at phone

\_\_\_\_\_ or email \_\_\_\_\_.

Sincerely,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Address)