IRA Charitable Rollover - How to Complete Your Gift

1. Choose the IRA from which you’d like to make your gift.

2. Select the amount of gift you would like to make.

3. Contact the IRA administrator for the forms necessary to transact your gift; or use the sample letter on the following page to send to your IRA administrator.

4. Let us know of your IRA gift. Please contact the Gift Planning Office at 800-MHC GIVE (800-642-4483) or giftplanning@mtholyoke.edu.
RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _________________.

Please issue a check in the amount of $_______________ payable to “The Trustees of Mount Holyoke College” (tax ID# 04-2103578) and send it to the address below:

Mount Holyoke College
Advancement Office
50 College Street
South Hadley, MA 01075

In your transmittal to Mount Holyoke, please record my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

I would like to designate this gift for:

☐ The Mount Holyoke Fund

☐ Other__________________________________________.

If you have any questions or need to contact me, I can be reached at ______________________.

Thank you for your assistance in this matter.

Date ______________________ Signature _________________________________

Name _________________________________

Address _________________________________

City, State, Zip _________________________________

cc: Anne Vittoria FP’05, Director of Gift Planning
Office of Gift Planning, Mount Holyoke College
50 College Street
South Hadley, MA 01075
giftplanning@mtholyoke.edu
(800) 642-4483 Fax: (413) 538-3005