

GIFT LETTER TEMPLATE: CHARITABLE IRA ROLLOVER

Date

Dear Napa Valley Community Foundation,

I have saved for retirement my entire life and have the good fortune of being able to give something back to my community. I have chosen to use my individual retirement account to make a gift to your organization. My account's administrator, NAME, will soon be transferring \$000,000, directly to Napa Valley Community Foundation.

I intend to comply with the requirements of the legislation and the Internal Revenue Code by making a qualified charitable distribution directly from my IRA to a public charity described in code section 170(b)(1)(A) (other than an organization described in section 509(a)(3) or a Donor Advised Fund (as defined in section 4966(d)(2)).

When you receive this gift from my IRA account administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me in consideration for this gift, and that my gift will not be placed in a Donor Advised Fund or Supporting Organization. My intention is to exclude this IRA distribution from my income.

Please use the qualified charitable distribution as follows:

- Community Leadership Fund:** *Meeting ever-changing needs through research; community conversation; and strategic grantmaking.*
- Community Impact Funds:** *Meeting specific needs in broad fields of interest*
 - One Napa Valley Initiative (helping Legal Permanent Residents in Napa Valley become US Citizens)
 - In School & Out of School Fund (helping children and youth succeed in school and improve their chances of becoming confident and contributing adults)
 - Fruit of the Vine Scholarship Fund (helping outstanding students from local high schools, who are the first in their families to attend college, pay for 4-year postsecondary education)
 - Capacity Grants Fund (helping strengthen the organizational capacity of nonprofit organizations working in Napa County)
 - Strong Communities Fund (helping our County's residents get their basic needs met and engage them in community life)

I look forward to hearing from you. If you have any questions or need to contact me, I can be reached at **address and telephone**.

Sincerely,

Donor Name: _____

Date of Birth: _____/_____/_____