



IRA Rollover Gift Transfer Request Form

Contact your IRA Administrator to initiate an IRA rollover to benefit Lifelong Access. Although your Administrator may have forms to request a transfer, you may also use this form. Contact Leni Kuntz at 309-451-8888 to let Lifelong Access know you intend to make an IRA charitable donation.

Lifelong Access Foundation is a nonprofit 501(c)(3) organization Federal Tax ID Number: 92-3684670

Date: _____

Donor Name: _____

please print

To: _____

name of IRA account administrator

Address: _____

City: _____ ST: _____ Zip: _____

Please accept this letter as my request to make a direct charitable distribution from my individual retirement account # _____ to the Lifelong Access Foundation, a tax exempt organization, as permitted by Internal Revenue Code Section 408(d)(8). In your transmittal to the Lifelong Access Foundation, please include my name and address as the donor of record and indicate the transfer is being made from my IRA Account. Please copy me on your transmittal.

Please issue a check in the amount of \$ _____ payable to Lifelong Access at this address:

Lifelong Access

c/o Leni Kuntz, Donor Engagement Specialist
2000 Jacobssen Drive
Normal, IL 61761

Phone: 309-451-8888, Ext 258

Email: lenikuntz@lifelongaccess.org

Donor Contact Information and Signature

It is my intention that this distribution qualify for exclusion from my taxable income during the 20____ tax year. Therefore, it is imperative this distribution be delivered to Lifelong Access no later than December 31, 20____.

If you have questions or need to contact me, I can be reached at this number: () _____ - _____

Thank you for your assistance with this request.

Donor Address: _____

City: _____ ST: _____ Zip: _____

signature



IRA Rollover Gift Instructions for Donor

Donor Instructions

To enable Lifelong Access to anticipate receipt of your gift and designate it to the purpose you choose, please send a completed copy of this form (or a completed copy of a form provided by your IRA Administrator) to:

Lifelong Access

c/o Leni Kuntz, Donor Engagement Specialist
2000 Jacobssen Drive
Normal, IL 61761

Please designate my donation for (check one):

_____ Where I can help you meet the Greatest Need

_____ Specific Purpose* (please describe below):

** Lifelong Access will do its best to honor your intentions and will contact you with any questions*

Recognition

Knowing my/our giving may inspire others to do the same, I/we accept recognition in the 1955 Legacy Society list (one gift of \$25,000 or more, cumulative giving of \$100,000 or more, or leaving a bequest) for this commitment and authorize Lifelong Access to list my/our name(s) with other donors to publicly recognize my/our generosity

I/we prefer to remain anonymous and do not wish recognition from Lifelong Access

Donor #1 Signature: _____ Date: _____

Donor #2 Signature: _____ Date: _____

Lifelong Access Signature: _____ Date: _____

If you wish to have your IRA Administrator make your qualified charitable distribution via electronic cash transfer or transfer of securities, please contact Leni Kuntz and she can provide the information needed to do so.

Lifelong Access Foundation is a 501(c)(3) organization

Federal Tax ID Number: 92-3684670

Questions?

Contact Leni Kuntz, Donor Engagement Specialist

Phone: 309-451-8888, Ext 258

Email: lenikuntz@lifelongaccess.org