

# B BROOKS SCHOOL CHARITABLE IRA ROLLOVERS

*Gift Planning*

Date

Name and Address of IRA Custodian or Trustee:

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

Re: Charitable IRA rollover – distribution to Brooks School

Dear custodian or trustee:

I hereby direct you to make a qualified charitable distribution (a “charitable IRA rollover”) of \$ \_\_\_\_\_ payable to Brooks School, a 501(c)(3) public charity that is qualified to receive charitable IRA rollovers under Section 408(d)(8) of the Internal Revenue Code and the Protecting Americans from Tax Hikes Act of 2015. This rollover should be made from the \_\_\_\_\_ (name of IRA account), account # \_\_\_\_\_. It is my intent to make this charitable IRA rollover for tax year 20\_\_ and it should be postmarked by December 31 or wire transferred by December 30, 2022.

Distribution by <u>CHECK</u>	OR	Distribution by <u>WIRE TRANSFER</u>
MAIL TO: Brooks School Attn: Heather Ferrara Advancement Office 1160 Great Pond Road North Andover, MA 01845		Receiving Bank Name: First Republic Bank Receiving Bank ABA #: 321081669 Receiving Bank SWIFT CODE: FRBBUS6S Beneficiary Account #: 80001826321 Beneficiary Account Name: Brooks School

In your transmittal to Brooks, please indicate my name and address as the IRA owner of record in connection with this transfer. Before initiating the distribution, please notify either Director of Advancement Services Heather Ferrara at 978-725-6275 or Director of Institutional Advancement Gage Dobbins at 978-725-6288.

For your reference, Brooks School’s tax identification number (EIN) is 04-2130844.

Also, please copy me on the transmittal and should you have any further questions, please contact me at the following phone or email: \_\_\_\_\_

Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

Name of Donor