

# 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 the provisions of the Protecting Americans from Tax Hikes Act of 2015 (the “PATH” Act, extending section 1201 of Public Law 109-280). This rollover should be made from the \_\_\_\_\_ (name of IRA account), account number \_\_\_\_\_. It is my intent to make this charitable IRA rollover for tax year 202\_ and it should be postmarked or wire transferred by December 31, 202\_.

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 Institutional Advancement Gage Dobbins at 978-725-6288 or Director of Advancement Services Heather Ferrara at 978-725-6275.

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