

## To make an IRA Rollover/Qualified Distribution to Charity for 2022



THE LUTHERAN HOME  
ASSOCIATION

Print and fill out both forms below.

1. The first form is the request to the administrator of your plan to direct your gift to The Lutheran Home Association. You will need to deliver this form to your financial advisor no later than December 15, so your gift can be processed before the end of the year.
2. The second form is a designation form. It provides The Lutheran Home Association with the information we need to direct your gift to your chosen ministry and ensures we have the information to send you the proper receipt so you can file your taxes and receive the maximum benefit from your gift.

If you have a question, contact Mark Hayes at: (952) 873-4746 or [mlhayes@tlha.org](mailto:mlhayes@tlha.org).

Date \_\_\_\_\_

Name of IRA administrator \_\_\_\_\_

Address \_\_\_\_\_

City, State ZIP \_\_\_\_\_



THE LUTHERAN HOME  
ASSOCIATION

RE: Request for direct Qualified Charitable Distribution from an individual retirement account

Dear IRA administrator,

Please accept this letter as my request to make a Qualified Charitable Distribution from my Individual Retirement Account number \_\_\_\_\_.

It is my intent for this to gift qualify as an IRA Charitable Rollover for the 2022 calendar year, as provided by the Protecting Americans from Tax Hikes Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986. Therefore, it is imperative that this distribution be postmarked no later than Dec. 31, 2022.

- Please transfer \$ \_\_\_\_\_ (up to \$100,000 per calendar year).  
Or
- Please transfer all funds.  
Or
- Please transfer \_\_\_\_\_% of my Required Minimum Distribution for 2022.

Direct my gift to **The Lutheran Home Association**, tax ID # 41-0706147.

Mail to:

**Attn: Mark Hayes**  
**The Lutheran Home Association**  
**337 S Meridian St., Belle Plaine, MN 56011**

Wired Funds:

**Contact Mark Hayes**  
**Phone: (952) 873-4746**  
**Email: mlhayes@tlha.org**

In your transmittal to The Lutheran Home Association, please include my name and address as the donor of record, identify this as a distribution from my IRA account, and copy me on the transmittal at the address below.

Sincerely,

\_\_\_\_\_ (Signature)

Name of donor \_\_\_\_\_

Donor's address \_\_\_\_\_

City, State ZIP \_\_\_\_\_

Donor's phone number \_\_\_\_\_

Donor's email address \_\_\_\_\_

# Designation of my IRA Qualified Charitable Distribution



THE LUTHERAN HOME  
ASSOCIATION

**Attn: Mark Hayes**  
**The Lutheran Home Association**  
**337 S Meridian St., Belle Plaine, MN 56011**

Mr. Hayes,

This letter is to inform you that I have instructed my IRA administrator to make a Qualified Charitable Distribution to The Lutheran Home Association.

## I WOULD LIKE MY GIFT TO BE USED FOR

### The Lutheran Home Association (TLHA)

TLHA Chaplaincy     Dementia/Alzheimer's programs

### Jesus Cares Ministries (JCM)

JCM – National     JCM – International

The Lutheran Home Facility (name) \_\_\_\_\_

*"Where the care of the soul is the soul of care."*  
Unless designated, your gift will be used as needed for a service of love to those entrusted to our care.

Sincerely,

\_\_\_\_\_ (Signature)

*Name of donor* \_\_\_\_\_

*Donor's address* \_\_\_\_\_

*City, State ZIP* \_\_\_\_\_

*Donor's phone number* \_\_\_\_\_

*Donor's email address* \_\_\_\_\_

*Date* \_\_\_\_\_

Mr. Hayes can be reached at (952) 873-4746 or mlhayes@tlha.org.