

June 29, 2023

Fidelity Investments
Transition Services
PO Box 770001
Cincinnati, OH 45277-0002

Re: _____, Deceased
IRA Beneficiary Gift

Greetings:

Please use this letter as authorization and instruction to liquidate the shares in the IRA account for _____ for the distribution to *your charity*. As a charitable entity rather than an individual, *your charity* is not required to provide the personal information of authorized signers or to sign as entity owners. *Your charity's* tax ID number and address should suffice.

Enclosed are the following signed forms:

- Fidelity IRA Beneficiary Distribution – Charity, Foundation or a University Form
- W-9
- Articles of Incorporation
- Certificate of Authority

The proceeds check should be mailed to the address below:

Your charity's address

Physical address:

Please mail a copy of the beneficiary designation and the date of death balance.

Sincerely,

