



**ROMAN CATHOLIC
DIOCESE of ORANGE**

PASTORAL CENTER: FINANCE OFFICE
13280 CHAPMAN AVENUE, GARDEN GROVE, CA 92840

IRA Rollover Instructions to Plan Administration

TO: Your IRA Plan Administrator _____
FROM: Plan Owner _____
ADDRESS: _____
EMAIL: _____ **PHONE:** _____
ACCOUNT #: _____ **DATE:** _____

RE: Request for Charitable Distribution from Individual Retirement Account

As the owner of the IRA Account _____ that is in the custody of your organization,
I request that you transfer from that account the sum of \$ [_____] **Via Check:**

Please issue a check in the amount of \$ _____ payable to:

Roman Catholic Bishop of Orange (Diocese), Tax ID #95-3018918

For the benefit of: _____ (please specify parish, fund, PSA, etc.)

Mail check to: Roman Catholic Bishop of Orange (Diocese), Attn: Anthony Jung
13280 Chapman Avenue, Garden Grove, CA 92840

Please accept this form as my request to make a direct charitable distribution from my IRA. In your transmittal to the charity, please memorialize my name and address as the donor of record in connection with the transfer. **Please copy me on your transmittal.**

If you have any questions or need to contact me, I can be reached at the information listed above.

Thank you for your assistance.

Sincerely,

Signature

Date