**SAMPLE LETTER REGARDING FUNDING A GIFT ANNUITY WITH ASSETS IN THE DONOR’S REVOCABLE LIVING TRUST**

[*Name of donor*]

[*Address*]

[*City/state/ZIP code*]

[*Name and title of contact person at charity*]

[*Name of charity*]

[*Address*]

[*City/state/ZIP code*]

Dear [*name of contact person at charity*]:

I am writing to confirm for you that [*identify assets*] transferred to [*name of charity*] from my revocable living trust, the [*name of trust*], should be regarded by your organization as a contribution made by me as an individual for a charitable gift annuity. This is because under the terms of the trust instrument governing the [*name of trust*] and as the sole settlor of the trust and its sole current beneficiary, I have the absolute right to direct that all of the assets of the trust be applied for purposes of my own choosing.

Thus, even though the [*identify assets*] could have been distributed from the trust to me and then contributed by me to [*name of charity*], I have chosen for the sake of convenience to have the distribution be made directly to the organization itself. Thank you for your understanding regarding this matter.

Sincerely,

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[*name of donor*] Date