**SAMPLE LETTER DIRECTING THAT ANNUITY PAYMENTS BE MADE   
TO A 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 direct [*name of charity*] to make all future payments pursuant to [*identify the gift annuity in question*] to the trustee of the [*name of living trust*] rather than to me as an individual. In executing this direction letter, it is my intention to confirm that all of my individual rights and interests in these payments are now held by the trust. I understand that Internal Revenue Service Form 1099-R will continue to be provided in my name as an individual.

In making these payments to the trust, please arrange for checks to be made out to [*specify how checks should read*].

If you have any questions about this letter, please do not hesitate to contact me or my legal counsel, [*name of attorney*]. Thank you for your cooperation.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[*name of donor*] Date