

Sample Letter of Instruction from Donor to IRA Provider

[DATE]

[NAME OF IRA PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

(Call your plan provider to determine the most efficient way to send this letter of instruction)

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable contribution from my Individual Retirement Account Number:

[insert account number]

as provided by the Tax Increase Prevention Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$_____ payable to [LEGAL NAME OF ORGANIZATION] at the following address:

[NAME OF ORGANIZATION]

[STREET ADDRESS]

[CITY, STATE, ZIP]

In your transmittal to the charity, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the 2016 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2016.

If you have any questions or concerns regarding this request, I can be reached at [PHONE AND EMAIL ADDRESSES].

Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

[DONOR NAME]