***SAMPLE Request Letter from IRA Plan Owner to IRA Administrator/Custodian for a Qualified Charitable Distribution from an Individual Retirement Account***

Date

IRA Administrator/Custodian Name

Street Address

City, State, Zip

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear IRA Administrator/Custodian:

Please accept this letter as my request to make a direct charitable distribution from my IRA account \_\_\_\_\_\_\_\_\_\_\_\_\_\_(specify account number) as provided by Sec. 112 of the Protecting Americans From Tax Hikes (PATH) 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 the organization below.

Parish Name

Parish Address

City, State Zip

In your transmittal to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (specify Parish Name here), whose Federal Tax ID Number is \_\_\_\_\_\_\_\_\_\_\_\_\_\_ (specify Parish Federal Tax ID Number), please include my name as the IRA owner of record in connection with this transfer. Please copy me on the transmittal letter.

Thank you for your assistance. Please contact me at ­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_(your phone number) or \_\_\_\_\_\_\_\_\_\_\_\_\_\_(your email) if you have any questions at all.

Sincerely,

Your First and Last Name

Street Address

City, State, Zip