

Individual IRA Owner/Donor Name
Street Address
City, State Zip Code
Tel: ###-###-####

(Month, day), 2019

Name of IRA Trustee/Custodian
Street Address
City, State Zip Code

RE: Letter of Instruction – Request for Qualified Charitable Distribution from IRA

Dear _____,

Please accept this letter as my written request to make a direct qualified charitable distribution from my Individual Retirement Account (IRA), payable to (tax-exempt nonprofit organization, as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

(Tax-exempt nonprofit organization) is a qualified 501(c)(3) charitable organization. Their Federal Tax Identification number is ##-#####. Please issue a check in the amount of \$(enter amount) directly payable to (tax-exempt nonprofit organization.

Mail it to: (your address, your financial advisor on record or the tax-exempt nonprofit organization).

[If mailed directly to your financial advisor or tax-exempt nonprofit organization, INSERT the following sentence.] In your transmittal, please note my name and address as the donor of this charitable contribution, and copy me on the transmittal at my home address on record.

It is my intention that this charitable distribution qualifies for exclusion from my taxable income, during the (year) tax year. Therefore, it is imperative that this qualified charitable distribution check request be processed and mailed at your earliest convenience.

If you have any questions, please contact my financial advisor, _____ at ###-###-####. Thank you for your prompt attention to this matter.

Sincerely,

Individual IRA Owner/Donor Name