

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

(Month, day), 2019

Qualifying Tax-Exempt Nonprofit Organization
Street Address
City, State Zip Code

RE: Charitable Distribution from IRA

Dear _____,

Please accept this enclosed check in the amount of \$ (amount) from (IRA trustee/custodian institution), the Individual Retirement Account (IRA) trustee/custodian, payable to (name of tax-exempt nonprofit organization), Federal Tax ID Number (##-#####), as a direct charitable distribution from my Individual Retirement Account ending in #last four digits, 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.

The purpose of this charitable donation is for (general fund or restricted fund - a fund that can only be used for specific purposes.)

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 distribution check be deposited no later than Dec. 31, (tax year.)

Please provide me with written acknowledgment (such as a receipt or a letter) for this charitable distribution for my individual tax return records, showing the name of the charity, the date of the contribution, and the amount of the contribution. Please also include a statement that no goods or services were provided by the organization in exchange for the contribution.

If you have any questions, please contact my financial advisor, _____ at ###-###-####. Thank you.

Sincerely,

Individual IRA Owner/Donor Name

Enclosure: Charitable Distribution Check