

Sample letter of instruction for a donor to send to their IRA provider to make a Qualified Charitable Distribution

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

Date : _____

[Name of IRA provider]

[Address of IRA provider]

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable contribution from my Individual Retirement under Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986, and made permanent under the Consolidated Appropriations Act of 2016. My account number is [insert account number].

The INN's tax ID number is: 11-2676892, and is a qualified charitable recipient for this transfer. It is my intention to have this transfer be a Qualified Charitable Distribution that will qualify for exclusion from my taxable income during the 20____ tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20____.

Please issue a check in the amount of \$_____ payable to The INN at the following address:

Chief Development Officer
The INN
211 Fulton Avenue, Hempstead, NY 11550

Please state my name and address as the donor of record in connection with this gift on the check disbursement.

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,

[Signature/s of donor/IRA owner]