

Sample Letter: Request from IRA Plan Owner to IRA Administrator/Custodian for a Qualified Charitable Distribution from their Individual Retirement Account

Date

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 Individual Retirement Account # (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 \$ (Dollar Amount) payable to the Wyoming School Foundation at the address listed below:

Wyoming School Foundation
420 Springfield Pike, Suite K
Wyoming, OH 45215

In your transmittal to the 501(c)(3) public charity, please include my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

(Optional paragraph for requests occurring close to December 31, 2016)

It is my intention that this transfer qualify for exclusion during the 2016 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2016.

If you have any questions, or need to contact me, I can be reached at (telephone). Thank you for your assistance in this matter.

Sincerely,

(Plan owner's name as it appears on the IRA account)