

Sample Letter

Request from You (IRA Plan Owner) to IRA Administrator for Charitable Distribution

** Consider calling your plan provider to determine the most efficient way to send this letter of instruction.*

[Date]

[IRA Administrator Name]

[IRA Administrator Address]

Re: Request for Qualified Charitable Distribution from Individual Retirement Account
Account Number: _____

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable distribution from my Individual Retirement Account # _____, as provided by the Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$_____ payable to "The Catholic Church Extension Society of the United States of America" and mail it to:

Catholic Extension
150 South Wacker Drive, Suite 2000
Chicago, IL 60606

Catholic Extension's tax identification number is 36-6000520.

In your transmittal to Catholic Extension, please include my name and address as the donor of record in connection with this distribution. Please copy me on your transmittal.

It is my intention to have this transfer qualify for the 20____ tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20____.

If you have any questions or need to contact me, I can be reached at _____
[provide your telephone number or email address].

Thank you for your assistance in this matter.

Sincerely,

[Your Name]

[Your Address]