

Sample Letter:

IRA Company Name & Address

(Date)

RE: Request for charitable distribution from my Individual Retirement Account for the 20__ Tax Year

Dear IRA Custodian (or name of your broker):

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account, Account # _____ as authorized by Section 408(d)(8) of the Internal Revenue Code.

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

Respite Care Charleston
1605 Harbor View Road
Charleston, SC 29412

In your transmittal to the above-named organization, please communicate my name and address as the donor of record in connection with this transfer. Also, please indicate that the purpose of the gift is:

_____ (*Examples: The General Fund, Scholarships, Support Groups, Meals for ½ day programs, etc.*)

Please copy me on your transmittal.

It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the 20__ tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative 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 _____.

Thank you for your assistance and prompt attention to this matter.

Sincerely,

Signature

Home Address

Print Name

Plan Owner

City, State, Zip