

Sample
QUALIFIED CHARITABLE DISTRIBUTION (QCD) REQUEST TO PLAN ADMINISTRATOR

[DATE]

[YOUR IRA CUSTODIAN FIRM, CONTACT, AND ADDRESS]

To Whom it May Concern:

This letter serves as my request to make a qualified charitable distribution from my individual retirement account [INSERT YOUR ACCOUNT NUMBER HERE] as provided for by the Protecting Americans from Tax Hikes Act of 2015. It is my intent that this distribution complies with Internal Revenue Code Section 408(d)(8).

Please issue the distribution in the amount of \$[INSERT DOLLAR AMOUNT] made payable to "The Regents of Mercersburg College" (TIN #23-1365963). This distribution should be forwarded directly to:

Mercersburg Academy
Carolyn Yeager
Chief Development Officer
100 Academy Dr.
Mercersburg, PA 17236

In your transmittal to Mercersburg Academy, please indicate my name as the IRA owner of record in connection with this transfer. Please contact me at [INSERT YOUR PHONE/EMAIL HERE] should you have any further questions about fulfilling this request. [OPTIONAL: It is my intention for this distribution to occur on or before DATE.]

Sincerely,

[INSERT YOUR NAME AND SIGNATURE]

Mercersburg Academy, please designate my gift as follows:

Cc: Mercersburg Academy | Office of Advancement | 100 Academy Dr. | Mercersburg, PA 17236
Carolyn Griffin Yeager, Chief Development Officer
Phone: 800-588-2550 | Email: yeagerc@mercersburg.edu