

Sample Letter to IRA Administrators

DATE

FINANCIAL INSTITUTION NAME (IRA ADMINISTRATOR)
ADDRESS
CITY, STATE, ZIP

Re: Request for qualified charitable distribution from [insert donor's name] individual retirement account

To Whom It May Concern:

I would like to request a qualified charitable distribution from my Individual Retirement Account No. _____ as provided for by the Protecting Americans from Tax Hikes 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 \$_____ payable to Notre Dame Academy.

The check should be mailed to:

Notre Dame Academy
Attn: Office of Advancement
1073 Main Street
Hingham, MA 02043

In your transmittal to Notre Dame Academy, please include my name and address as the donor.

It is my intention to have this distribution qualify for the exclusion from my taxable income during the ____ tax year. Therefore, it is imperative this distribution be made no later than Dec. 31, ____.

If you have any questions, please contact me.

Thank you for your assistance in this matter.

Sincerely,
YOUR NAME
YOUR ADDRESS
YOUR TELEPHONE NUMBER