

[Sample letter: Request from donor for direct charitable distribution from an individual retirement account]

Date

Name of IRA administrator

Address

City, State ZIP

RE: Request for Direct Charitable Distribution from IRA

Dear IRA administrator:

Please accept this letter as my request to make a direct qualified charitable distribution from my individual retirement account number [insert number here] as provided for by the Consolidated Appropriations Act of 2016 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended for the 2016 calendar year.

Please issue a check in the amount of \$ [redacted], payable to Lancaster Mennonite School and mail it to:

Lancaster Mennonite School
2176 Lincoln Hwy E
Lancaster, PA 17602
Attn: Heidi Stoltzfus

The qualified charitable organization's federal tax identification number is: 23- 6396950

In your transmittal to the above named charitable organization, please memorialize my name and address as the donor of record in connection with this transfer, and copy me on the transmittal at the address below.

It is my intention that this gift complies with IRC 408(d)(8). It is also my intention to have this transfer qualify during the 2017 tax year. Therefore, it is imperative that this distribution be postmarked no later than Dec. 31, 2017.

If you have any questions or concerns regarding this request, I can be reached at [insert your telephone number and/or email address].

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

Sincerely,

Name of donor

Donor's address

City, State ZIP

Donor's phone number