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

Dear Sir or Madam:

Please make a direct charitable distribution of $\_\_\_\_\_\_ from my IRA account Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ made payable to “The Parish of St. Ann”(Tax ID: 51-0116060). This gift is made free of tax as provided in H. R. 2029:Division Q-Protecting Americans from Tax Hikes Act of 2015.

The check should be mailed to: The Parish of St. Ann

691 Garfield Parkway

Bethany Beach, Delaware 19930

It is my intention to have this transfer qualify for the 202\_\_ tax year. Therefore, it is imperative

This distribution be made no later than December 31, 202\_\_. Please list my name and address as the donor for the transfer, and please send me a copy of the correspondence with The Parish of St. Ann.

Sincerely,

Name of Donor

Address

City, State, Zip

Telephone Number