

SAMPLE LETTER

Request for Qualified Charitable Distribution from IRA

TO: [IRA Administrator/Financial Firm]
[Address]
[City, State, ZIP Code]

FROM: [Name of Owner of Retirement Account]
[Address]
[City, State, ZIP Code]

RE: Request for Charitable Distribution from IRA # [insert Account Number here]

Date:

Dear IRA administrator:

Please accept this letter as my request to make a direct charitable contribution from my individual retirement account number [insert account number here].

Please issue a check in the amount of \$ _____ payable to The Juneau Symphony (which is a public charity) and mail the check directly to this organization at the following address:



The Juneau Symphony

PO Box 21236
Juneau, AK 99802
ATTN: Donor Relations
EIN: 92-0080948

In your transmittal to The Juneau Symphony, please provide my full name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. It is my intentions to have this transfer qualify for exclusion from taxable income during the [current year] tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, [current year].

If you have any questions or need to contact me, I can be reached at [telephone].

Thank you for your assistance in this matter.

Sincerely,

[Plan Owner]
[Plan Owner Address]