

Sample Request from Donor to Administrator for Charitable Distribution from Individual Retirement Account

RE: Request for Charitable Distribution from Individual Retirement Account

Dear (Plan Administrator):

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____.

Please issue a check in the amount of \$_____ payable to the organization below:

Boys & Girls Clubs of Monterey County
Attention: Donna Ferraro, CEO
PO Box 97
Seaside, CA 93955
Phone: 831.394.5171
EIN/Tax ID: 94-1702753

In your transmittal, please mention my name and address as the donor of record in connection with this transfer; please send me a copy of the notice.

It is my intention to have this transfer qualify for income exclusion during the _____ tax year. Therefore, it is imperative this gift be completed by December 31 [or specify date requested for completing transfer].

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,

(IRA Plan/Account Owner)

cc: Boys & Girls Clubs of Monterey County