

Instructions:

SAMPLE IRA GIFT RECEIPT LETTER 2016

For a Church to give to a Donor

When a church or charity receives a gift directly from an IRA administrator, that gift will need a special gift acknowledgement. The following sample letter is suggested as an immediate acknowledgement and receipt that will provide the proper record for the giver.

You may print this sample letter (preferably on church letterhead) and simply fill in the blanks by hand. Or, we will be happy to email your office an editable version – just call 800-332-8238 or email foundation@mumf.org. **(Remember: This type of gift is NOT tax-deductible, so any year-end gift summary statements should reflect that fact.)**

To complete the letter, fill in the blanks as follows:

- 1) Enter the date, and the mailing name(s) and address of the donor(s).
- 2) Enter the name(s) being addressed.
- 3) Enter the amount of the gift received.
- 4) Enter the post-marked date of the gift (assuming mail delivery).
- 5) Enter the name of the church.
- 6) An authorized church administrator or officer should sign the letter.
- 7) (Optional) Include the church name and mailing address.

This material and additional information for donors is available on the Foundation website (www.mumf.org) or by calling the Foundation office at 800-332-8238.

Date

Donor Name(s)

Address

IMPORTANT TAX DOCUMENTATION
RE: 2016 IRA Qualified Charitable Distribution (QCD)

Dear _____,

Thank you for your charitable gift in the amount of \$ _____ from your Individual Retirement Account. We are writing to acknowledge that we received your gift postmarked _____, 2016 directly from your plan trustee/administrator/custodian. Therefore, all or a portion of your gift may qualify as a **2016** qualified charitable distribution from your IRA under section 408(d)(8) of the Internal Revenue Code and the Protecting Americans from Tax Hikes Act of 2015.

In that connection, we warrant to you that our organization is qualified as a public charity under section 170(b)(1)(A) of the Internal Revenue Code and that your gift was not transferred to either a donor advised fund or a supporting organization as described in section 509(a)(3). We further warrant that no goods or services of any monetary value were or will be transferred to you in connection with this gift other than intangible religious benefits. **Please note: A QCD is not a tax-deductible charitable gift. A QCD may, however, count towards the annual IRA required minimum distribution (RMD) and not be deemed taxable income. Please consult with your own professional tax advisor regarding this and all appropriate matters.** Please retain this letter with your important tax documents and provide a copy to your tax preparer.

Thank you for your generous contribution in support of the ministries of _____ United Methodist Church. Together we are sharing the love of the living Christ with a world in need.

Cordially,

Authorized Church Administrator Signature

Church name and address