

Sample Letter for Charitable Distribution from IRA

[Date]

TO:

[IRA Administrator]

[Address]

[City, State, ZIP Code] RE:

Request for Charitable Distribution from Individual Retirement Account
Account # _____

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from the account referenced above, as provided by Section 112 of the Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended. Please issue a check in the amount of \$_____ [not to exceed \$100,000] payable to the National Repertory Orchestra (EIN 84-0566793).

Please mail the check directly to this organization at the following address:

The National Repertory Orchestra

PO Box 6336

Breckenridge, CO 80424

Attn: Development Department

In your transmittal to the National Repertory Orchestra, please give my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

It is my intention 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]