



Sample Letter of Instruction from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account

(Date)

(Name of IRA Administrator)

(Address)

(City, State, Zip)

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ as provided by the provisions of The Protecting Americans from Tax Hikes (PATH) Act of 2015.

Please issue a check in the amount of \$ _____ payable to Strawbery Banke Museum at the address below:

Joseph April, Director of Development
Strawbery Banke Museum
PO Box 300
Portsmouth, NH 03082

In your transmittal to the charity, please note 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 during the 20xx tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20xx.

If you have any questions or need to contact me, I can be reached at _____,
_____. (phone) (email)

Thank you for your assistance in this matter.

Sincerely,

_____ (print name)

_____ (signature)





Attn: Joseph April
Director of Development
PO Box 300
Portsmouth, NH 03802

Dear Mr. April:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to your organization in the amount of \$ _____ from my plan trustee/administrator, _____.

It is my intent to comply with the provisions of The Protecting Americans from Tax Hikes (PATH) Act of 2015. Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the date and amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

If you have any questions or need to contact me, I can be reached at _____,
_____. (phone) (email)

Sincerely,

_____ (print name)

_____ (signature)

