

Sample IRA Provider Letter

Below is a sample letter of instruction that a donor can use with their individual retirement account (IRA) provider to request a qualified charitable distribution from their IRA. Donors will need to fill in the highlighted information below.

Date

Donor Name

Donor Street Address

City, State, Zip Code

Name of IRA Provider

IRA Provider Street Address

City, State, Zip Code

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct qualified charitable contribution from my Individual Retirement Account # (account number) as provided under Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, and the Protecting Americans from Tax Hikes Act of 2015.

Please issue a check in the amount of \$ (contribution amount) payable to the National Foundation for the Centers for Disease Control and Prevention, Inc. (CDC Foundation) at the following address:

National Foundation for the Centers for Disease Control and Prevention, Inc.
600 Peachtree St NE, Suite 1000
Atlanta, GA 30308

The CDC Foundation's federal tax identification number is 58-2106707.

In your transmittal to the charity, please include my name and address as the donor of record in connection with this distribution, and please copy me on your transmittal.

It is my intention to have this transfer qualify during the (current) tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, (tax year).

If you have any questions or concerns regarding this request or need to contact me, I can be reached at (phone and email).

Thank you for your prompt attention to and assistance in this matter.

Sincerely,

Donor Name
