

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account

[Date]

Name of IRA Administrator

Financial Institution

Address

City, State ZIP

RE: Request for Charitable Distribution from (insert donor's name) 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 # (Account Number) as provided by the Protecting Americans from Tax Hikes Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

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

Pennsylvania College of Health Sciences
850 Greenfield Road
Lancaster, PA 17601
ATTN: Ellen Wylie, Vice President of Advancement

These funds are to be used for _____. The tax ID number of this organization is 06-1645496.

In your transmittal to the above named charitable organization, please list my name and address as the donor of record in connection with this transfer, and copy me on the transmittal letter at the address below. It is my intention that this gift complies with the IRC 408(d)(8). It is also my intention to have this transfer qualify during the 2017 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2017.

If you have any questions regarding this request, I can be reached at [insert your telephone number and/or email address]. If you need any additional information from the College, you may contact Ellen Wylie at (717) 947-6089 or by email at ebwylie@pacollege.edu.

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

Sincerely,

Name of Donor

Donor's Address City, State ZIP

Donor's Phone Number