

**Sample Letter from Donor to Plan Administrator Requesting
Charitable Distribution from IRA**

Donor Name:
Donor Address:

Date:

Plan Administrator Name
Plan Administrator Address

RE: Request for Qualified Charitable Distribution from IRA
_____ in the name of _____

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable distribution (a “charitable IRA rollover”) from my Individual Retirement Account # _____ as provided by the Protecting Americans from Tax Hikes Act of 2015.

Please issue a check in the amount of \$ _____ (not to exceed \$100,000) payable to The Forward and mail it directly to the following address:

The Forward
125 Maiden Ln. Floor 8
New York, NY 10038
ATTENTION: Lisa Lepson

The qualified charitable organization’s Federal Tax Identification number is 13-0623590.

In your transmittal to The Forward please give my name and address as the donor of record in connection with this transfer and indicate that the check is for the benefit of The Forward. Please copy me on your transmittal as indicated on the top left.

It is my intention that this gift complies with IRC 408(d)(8) and it is also my intention to have this transfer qualify for exclusion with respect to the 20__ tax year.

If you have any questions or need to contact me, I can be reached at
[phone] _____ or [email] _____.
Thank you for your assistance in this matter.

Sincerely,

[Donor Name Listed on the IRA]