

classical 89.5 fm



Sample Request Letter from Plan Owner to Administrator for a Charitable Distribution from an IRA

[Date]

[IRA CUSTODIAN COMPANY NAME]

Re: Request for Charitable Distribution from an Individual Retirement Account

Dear IRA Administrator:

Please accept this letter as my request to make a qualified charitable distribution from my individual retirement account number [insert number here] 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 name of Friends of Public Radio Arizona at the following address:

Friends of Public Radio Arizona – KBACH
PO Box 62228
Phoenix, Arizona 85082-2228

The Tax Identification Number for Friends of Public Radio Arizona is: 01-0579687.

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

If you have any questions or concerns regarding this request, I can be reached at [insert your telephone number and/or email address]. Thank you for your prompt attention to and assistance in this matter.

Sincerely,

[YOUR NAME]

[YOUR ADDRESS]

[YOUR TELEPHONE NUMBER]

Cc: Brian Fergus, Philanthropic Relations Officer
Friends of Public Radio Arizona, PO Box 62228, Phoenix, AZ 85082-2228
(480) 774-8460