

Sample Letter to Request a Direct Charitable Distribution from an IRA

Date

Name of IRA administrator

Address

City, State ZIP

RE: Request for Direct Charitable Distribution from IRA

Dear IRA administrator:

Please accept this letter as my request to make a direct qualified charitable distribution from my individual retirement account number [insert number here] as provided for 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 Peninsula Humane Society & SPCA and mail it to:

Peninsula Humane Society & SPCA
1450 Rollins Road
Burlingame, CA 94010

Attn: Lisa Van Buskirk

Peninsula Humane Society & SPCA's federal tax identification number is: 94-1243665

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 the 2018 tax year. Therefore, it is imperative that this distribution be postmarked no later than Dec. 31, 2018.

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