

Sample Letter

Request from You (IRA Plan Owner) to IRA Administrator for Qualified Charitable Distribution

[Date]

[IRA Administrator Name]

[IRA Administrator Address]

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

To Whom It May Concern:

Please accept this letter as my request to make a direct qualified charitable distribution 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 \$_____ payable to the Union of Concerned Scientists and mail it to:

Union of Concerned Scientists
2 Brattle Square
Cambridge, MA 02138-3780

Phone number: (617) 301-8095
Email address: plannedgiving@ucsusa.org

The Union of Concerned Scientists is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and thus qualifies for the direct charitable distribution from individual retirement accounts. The Union of Concerned Scientists' tax ID is 04-2535767.

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

It is my intention to have this transfer qualify for the 20__ tax year. Therefore, it is imperative that this distribution be delivered and clear my account no later than December 31, 20__.

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

Sincerely,

Your Name

Your Address