

IRA Distribution Letter Template

This one-page letter is pre-filled with the information you need to make a distribution to Catholic Charities. Simply add your information, print the letter and mail it to your retirement account provider (address below). Please delete the instructions before printing the letter.

Attn: Retirement Distributions
(NAME OF FIRM)
ADDRESS
CITY, STATE ZIP CODE

IMPORTANT: Please send a letter or an email, endorsed by the individual(s) whose name(s) appear(s) on the account informing Catholic Charities of the Archdiocese of Washington of the details and purpose of the transfer. Include your name, address, name of financial institution managing the IRA account, and the amount of donation.

You may mail this letter to:

Catholic Charities of the Archdiocese of Washington
Attention: Kevin T. Daly
924 G Street NW
Washington, DC 20001

kevin.daly@cc-dc.org

DATE

RE: Request for Direct Qualified 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 authorized under Sec. 408(d)(8) of the Internal Revenue Code, as amended.

Please issue a check in the amount of **[\$amount]**, payable to Catholic Charities of the Archdiocese of Washington and mail it to:

Catholic Charities Archdiocese of Washington
924 G Street NW
Washington, DC 20001

The qualified charitable organization's federal tax identification number is: EIN: 53-0196524.

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.

If you have any questions or concerns regarding this request, I can be reached at **[Your Phone Number]** or **[Your Email Address]**.

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

Sincerely,

[Your First and Last Name]

[Your Address]

[Your City, State ZIP]

[Your Phone Number]