

SAMPLE LETTER / EMAIL for a Qualified Charitable Distribution (QCD) from an IRA

[Your Name]
[Address]
[City, State, Zip]
[Phone Number]
[Email Address]

[Date]

[IRA Administrator's Name]
[Company Name]
[Address]
[City, State, Zip]

Dear [IRA Administrator's Name],

Please accept this letter as my formal request to make a Qualified Charitable Distribution from my Individual Retirement Account (IRA), account number **[Account Number]**, as provided by the Protecting Americans from Tax Hikes (PATH) Act of 2015 and the Internal Revenue Code Section 408(d)(8).

Transfer the amount of **[\$Amount]** directly to the following qualified charitable organization:

Presbyterian Senior Services (PSS)
2095 Broadway, Suite 409
New York, NY 10023
Tax ID: 13-1981482

Please issue a check payable to Presbyterian Senior Services and mail it to the address above. It is my intention that this gift be treated as a Qualified Charitable Distribution under the provisions of the IRS Code and that it count toward my Required Minimum Distribution for the year [Year].

Please notify me when the distribution has been made and confirm the amount and date of the transfer. If you have any questions, please feel free to contact me at [Phone Number] or [Email Address].

Thank you for your prompt assistance with this request.

Sincerely,
[YOUR Name]