

Sample Request Letter To IRA Administrator

[Date]

[IRA Administrator]

[Address]

RE: Request for Charitable Distribution from IRA

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account [#] as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of [\$] payable to Jewish Family Service of San Diego and mail it to:
Jewish Family Service of San Diego
JOAN & IRWIN JACOBS CAMPUS, Turk Family Center
8804 Balboa Avenue
San Diego, CA 92123

Jewish Family Service's tax identification is # 95-1644024.

In your transmittal to Jewish Family Service of San Diego, please include my name and address as the donor of record in connection with this transfer.

It is my intention that the above listed gift be treated as a qualified charitable distribution and that the same be used to satisfy, in whole or in part, my Required Minimum Distribution in [year], if applicable.

If you have any questions or need to contact me, I can be reached at [].

Thank you for your assistance in this matter.

Sincerely,

[Include your name and address]

Questions?

Contact Lacey Lee at (858) 637-3217 or email lacey@jfssd.org
Jewish Family Service of San Diego
JOAN & IRWIN JACOBS CAMPUS • Turk Family Center
8804 Balboa Avenue, San Diego, CA 92123

