

Sample Letter of Instruction from Donor to IRA Provider

[DATE]

[NAME OF IRA PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

(Call your plan provider to determine the most efficient way to send this letter of instruction)

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

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 Sec 112 of 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 Silver Cross Foundation and mail it to:

Silver Cross Foundation
1900 Silver Cross Blvd.
New Lenox, IL 60451

The qualified charitable organization's federal tax identification number is: 36-3185350

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 [insert your telephone number and/or email address]. Thank you for your prompt attention to and assistance in this matter.

Sincerely yours,

Name of Donor

Donor's Address

Donor's Phone Number and/or Email