

SAMPLE LETTER

Request for Qualified Charitable Contribution from IRA

TO: _____
(Your IRA Administrator/Financial Firm)

(Address)

FROM: _____
(Your Name)

(Your Address)

RE: Request for Charitable Distribution from IRA #: _____
(Your IRA Account Number)

Date: _____

Dear IRA Administrator:

Please accept this letter as my request to make a direct charitable contribution from my individual retirement account number: _____.
(Your IRA Account Number)

Please issue a check in the amount of \$ _____ payable to The YMCA of Superior California (which is a public charity) and mail the check directly to this organization at the following address:

YMCA of Superior California

(EIN: 94-1156634)

1926 V Street

Sacramento, CA 95818

In your transmittal to The YMCA of Superior California, please provide my full name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. It is my intention to have this transfer qualify for exclusion from taxable income during the 2024 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2024.

If you have any questions or need to contact me, I can be reached at _____ . Thank you for your assistance in this matter. (phone)

Sincerely,

(Signature, Date)