

Sample Letter: Request from Donor for Direct Charitable Distribution from an Individual Retirement Account

Date

[Name of IRA Administrator]
[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 Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$_____ payable to The TEP Foundation, Inc. and mail it to:

The TEP Foundation, Inc.
770 Anderson Ave, 11K
Cliffside Park, NJ 07010
Attn: Jason Berler
(551) 265-0549

The TEP Foundation's tax identification number is 13-6161286.

In your transmittal to the above-named charitable organization, please include 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 the [insert year] tax year. Therefore, it is imperative that this distribution be postmarked no later than Dec. 31, [same year as above].

If you have any questions or concerns regarding this request, I can be reached at [insert your telephone number and/or e-mail address]. Thank you for your prompt attention to this matter.

Sincerely yours,

Name of donor
Donor's address
City, State ZIP
Donor's phone number