

## 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 qualified charitable contribution from my Individual Retirement under Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986, and made permanent under the Consolidated Appropriations Act of 2016. My account Number is:

**[insert account number]**

Please issue a check in the amount of \$\_\_\_\_\_ payable to United Way Buffalo & Erie County at the following address:

United Way of Buffalo & Erie County  
742 Delaware Ave.  
Buffalo, NY 41209

In your transmittal to the charity, please state my name and address as the donor of record regarding this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the **current** tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, **of this tax year**.

If you have any questions or concerns regarding this request, I can be reached at [PHONE AND EMAIL ADDRESSES].

Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

[DONOR NAME]