

Sample Request Letter from Donor for Direct Charitable Distribution from an Individual Retirement Account (IRA)

Date

Name of IRA administrator

Address

City, State, Zip

RE: Request for qualified charitable distribution from Individual Retirement Account
_____ n/o (name of) _____

Dear IRA Administrator:

Please accept this letter as my request to make a qualified charitable distribution from my Individual Retirement Account, account number (insert account number here) as authorized under section 408(d)(8) of the Internal Revenue Code (IRC)

Please issue a direct transfer of funds in the amount of \$ _____ payable to Luther College, at the address below. Luther College is a public charity and is not a donor advised fund or supporting organization. My gift will not be placed in a charitable gift annuity, charitable remainder trust, donor advised fund or supporting organization. The Tax ID number for Luther College is 42-0680466.

Luther College
Attn: Kelly Sorenson
Assistant Director of Legacy and Gift Planning
700 College Drive
Decorah, IA 52101

In your transmittal to Luther College, please note my name and address as the donor of record in connection with this transfer, and copy me on your transmittal at my 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 2023 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2023.

If you have any questions or concerns regarding this request, please promptly call me at _____ and/or e-mail me at _____. Thank you for your prompt attention to and assistance with this matter.

Yours truly,

Your Name

Address

City/State/ZIP

Phone Number