Sample IRA Charitable Distribution Instruction Letter

Following is a sample instruction letter you may use to request an IRA charitable gift distribution through your financial advisor as well as notification to the Hoover Presidential Foundation of your gift.

Please contact Mundi McCarty, Director of Development at 319-643-5327 or mmccarty@hooverpf.org if you have any questions about IRA charitable gift distribution. The Hoover Presidential Foundation is not able to provide tax advice; donors are encouraged to seek professional tax counsel.

Sample Request Letter from Donor to Financial Advisor for a Charitable Distribution from an IRA

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution in the amount of $______________ from my Individual Retirement Account # _____________ [account number].

Please send me the appropriate form to issue a check from the above IRA account in the amount of $______________, payable directly to the Hoover Presidential Foundation.

This distribution should be made payable to:

Hoover Presidential Foundation
302 Parkside Drive
PO Box 696
West Branch, Iowa 52358
Tax ID#: 42-0848288
Jerry Fleagle, Executive Director

My contact at the Hoover Presidential Foundation is Mundi McCarty, Director of Development, who can be reached by calling (319) 643-5327 or by e-mail at MMcCarty@HooverPF.org.

In your transmittal to the Hoover Presidential Foundation, please mention my name and address as the donor of record in connection with this distribution. Please copy me on your transmittal. I intend to make this gift in the 20__ tax year; therefore it is imperative that this gift be postmarked by December 31, 20__. If you have any questions or need to contact me, I can be reached at _____________________ [telephone #].

Thank you for your assistance in this matter.

Sincerely,

[Plan owner]

Cc: Jerry Fleagle