

IRA Distribution Letter Template

This one-page letter is pre-filled with the information you need to make a distribution to the Sacred Heart Co-Cathedral Campaign. Simply add your information, print the letter, and mail to your retirement account provider. Please delete these instructions before printing the letter.

Attn: Retirement Distributions
[Company name]
[Address]
[City, State Zip]

[insert date]

RE: Request for Direct Qualified Charitable Distribution from IRA

Dear IRA Administrator:

Please accept this letter as my request to make a direct qualified charitable distribution from my individual retirement account number **[insert number here]** as authorized under Sec. 408(d)(8) of the Internal Revenue Code, as amended.

Please issue a check in the amount of **[\$[amount]]**, payable to: **Sacred Heart Co-Cathedral/CSA** and mail it to:

Diocese of Wheeling-Charleston
Catholic Sharing Appeal
1311 Byron St.
Wheeling, WV 26003

The qualified charitable organization's federal tax identification number is: **55-0357023**

In your transmittal to the above-named charitable organization, **please memorialize my name and address as the donor of record in connection with this transfer** and copy me on the transmittal at the address below. I intend to have this transfer qualify during this tax year.

If you have any questions or concerns regarding this request, I can be reached at **[Your Phone Number]** or **[Your Email Address]**. Thank you for your prompt attention to and assistance in this matter.

Sincerely,

[Your First and Last Name]
[Your Address]
[Your City, State ZIP]