

IRA Charitable Distribution Authorization Letter Template

*The following letter template from an IRA owner to the IRA administrator authorizes a qualified charitable distribution from an individual retirement account. The letter may need a signature guarantee. The IRA owner should ask the custodian about signature requirements and the mailing address. Calling your custodian may be easier than sending this letter. No taxes need to be withheld.*

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

IRA plan administrator name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Re: Request for qualified charitable distribution from IRA account

Dear Sir or Madam:

Please accept this letter as my request and authorization for you to make a qualified charitable distribution from my IRA account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as provided by the Protecting Americans from Tax Hikes Act of 2015 (H.R. 2029) and Section 408(d)(8) of the Internal Revenue Code.

* Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ payable to **WELS Foundation Inc.** at the address below:

WELS Foundation Inc.

N16W23377 Stone Ridge Drive

Waukesha, WI 53188

* Please send the WELS Foundation Inc. check to my personal address. I will deliver it to the charity with instructions, if necessary.

For your records, WELS Foundation’s tax identification number is 39-6084446.

It is my intention that this transfer will qualify for exclusion during the 20\_\_ tax year.

Thank you for assisting me with this gift. If you have questions, please call me.

Sincerely,

Signature of IRA owner:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

IRA owner name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_