**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 Account Number:

**[insert account number]**

as provided by the Tax Increase Prevention Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check\* in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_ payable to *The Foundation of the Roman Catholic Diocese of Raleigh, Inc.* at the following address:

The Foundation of the Roman Catholic Diocese of Raleigh, Inc.

Attn: Ryan T. Flood, Planned Giving Specialist

4700 Homewood Ct, Suite 320

Raleigh, NC 27609

Tax I.D.#: 83-1609483

In your transmittal to the charity, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is 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, 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]

\*You may also make your gift using appreciated securities.