

IRA Distribution Letter Template

This one-page letter is pre-filled with the information you need to make a distribution to the Diocese of Wheeling Charleston Catholic Sharing Appeal. 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: **Catholic Sharing Appeal** 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]