

Sample Request to IRA Administrator for Qualified Charitable Distribution

[Donor Name, Address, and Contact Information]

[Date]

[Name of IRA Administrator]

[IRA Administrator Address]

RE: Request for Charitable Distribution from IRA

Dear [IRA Administrator]:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as provided in Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue the distribution in the amount of $\_\_\_\_\_\_\_\_\_\_\_ payable to North Carolina Wesleyan University and mail it to:

Tammy Robinson | Advancement Office

North Carolina Wesleyan University

3400 N. Wesleyan Blvd.

Rocky Mount, NC 27804

For your reference, Wesleyan’s federal tax identification number is 56-0686603.

In your transmittal to NC Wesleyan, please include my name and address as the donor of record in connection with this distribution and indicate that this distribution should be used to support \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Please copy me on your transmittal.

It is my intention that this distribution qualify for exclusion from my taxable income as a qualified charitable distribution during the 2023 tax year. Therefore, it is imperative that this distribution be delivered to NC Wesleyan no later than December 31, 2023.

If you have any questions or need to contact me, I can be reached at [insert your phone/email here].

Thank you for your assistance in this matter.

Sincerely,