

Central Reform Temple of Boston

Sample Individual Retirement Account Qualified Charitable Distribution Request

Date

[Name of IRA administrator]

[IRA Administrator Address]

RE: Request for a Qualified Charitable Distribution or Charitable Rollover from IRA

Dear IRA administrator:

Please accept this letter as my request to make a qualified charitable distribution, also known as a charitable rollover from my Individual Retirement Account #[
_____] as authorized by Section 408(d)(8) of the Internal Revenue Code and the Protecting Americans from Tax Hikes Act of 2015.

Please issue a check in the amount of \$[_____] payable to Center Central Reform Temple of Boston and mail it to:

Central Reform Temple of Boston

Treasurer

15 Newbury Street

Boston, MA 02116

In your transmittal, please include my name and address as the donor of record in connection with the distribution and copy me.

It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the 20__ tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative this distribution be postmarked no later than December 31, 20__.

If you have any questions or need to contact me, I can be reached at [insert contact information].

Thank you.

[Your Name and Email]