

Sample Document

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # (Account Number).

Please issue a check in the amount of \$_____ payable to the organization at address below:

Hampton Roads Community Foundation
101 W. Main Street, Suite 4500
Norfolk, VA 23510
(757) 622-7951
Attn: Kay A. Stine, vice president for development

In your transmittal to the charity, please list my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal letter.

If you have any questions or need to contact me, I can be reached at [donor phone number] or by e-mail at [donor e-mail address].

Thank you for your assistance in this matter.

Sincerely,

Donor Name
Donor Address

The Hampton Roads Community Foundation does not provide legal or tax advice. We encourage you to discuss this transfer with your professional advisors.