**Sample Request Letter from Plan Owner to Administrator for a**

**Charitable Distribution from an IRA**

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Current policy permits a rollover directly from an IRA to a qualified public charity. As the owner of IRA account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ that is in the custody of your organization, I request that you transfer from that account the sum of $\_\_\_\_\_\_\_\_\_\_\_\_ to Nativity Prep Academy located in San Diego, California. The federal tax ID number for Nativity Prep Academy is 33-0886247.

Distributions should be made payable to:

Nativity Prep Academy

Attn: Philanthropy Department

2755 55th Street

San Diego, CA 92105

Tax ID# 33-0886247

You can reach Nativity Prep Academy’s Philanthropy department by calling Lisa Welch at  
(619) 544-9455 x227, or by email at lwelch@nativityprep.org. In your transmittal to Nativity Prep Academy please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have any questions or need to contact me, I can be reached at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [telephone number or email address]. Thank you for your assistance in this matter.

Sincerely, [Plan owner]

**Sample Letter from Donor Informing Nativity Prep Academy of Forthcoming Charitable Distribution from IRA Trustee/Administrator**

Nativity Prep Academy

Attn: Philanthropy Department

2755 55th Street

San Diego, CA 92105

To Whom It May Concern:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to Nativity Prep Academy in the amount

of $

from my plan trustee/administrator,

[name

of IRA trustee/administrator].

It is my intention to comply with current policy that permits a rollover directly from an IRA to a qualified public charity.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by Nativity Prep Academy in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I will receive an acknowledgement of this distribution, I understand that there is no federal charitable income tax deduction for this distribution.

[Optional]: I intend for my gift to Nativity Prep Academy to be used for the following purpose: [gift designation, if any].

If you have any questions or need to contact me, I can be reached at the following telephone number: .

Sincerely,

[Your name]