

Sample Letter from Donor to Plan Administrator Requesting a  
Charitable Distribution from Your IRA to Trinity Church

Donor Name  
Donor Address

[You can mail the letter]  
[Or scan and e-mail it]

Date

Plan Administrator Name

Plan Administrator Address

Subject: Request for Charitable Distribution from IRA # \_\_\_\_\_ in the  
name of \_\_\_\_\_

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my  
Individual Retirement Account # \_\_\_\_\_ as provided by the Trade  
Facilitation and Trade Enforcement Act of 2015.

Please issue a check in the amount of \$ \_\_\_\_\_ to Trinity Episcopal Church of  
Buffalo, and mail it directly to the following address:

Trinity Church  
371 Delaware Avenue  
Buffalo, NY 14202  
Attention: Treasurer

In your transmittal to Trinity, please give my name and address as the donor of record in  
connection with this IRA transfer. Please send me a copy of your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 20\_\_ tax year.

If you have any questions or need to contact me, I can be reached at [phone] or [e-mail].  
Thank you for your assistance in this matter.

Sincerely,

Donor Name [Must be your actual signature, not typed in]