

SAMPLE REQUEST FROM PLAN OWNER TO IRA ADMINISTRATOR FOR 2020 CHARITABLE DISTRIBUTION

[Donor Name]
[Donor Address]

_____, 2020
Month Day

[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 a check in the amount of \$_____ payable to the San Mateo County Community Colleges Foundation (“SMCCCF” or “Foundation”) and mail it to:

Executive Director
San Mateo County Community Colleges Foundation
3401 CSM Dr
San Mateo, CA 94402

The Foundation’s tax identification number is 94-6133905.

In your transmittal to the SMCCCF, 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 2020 tax year. Therefore, it is imperative that this distribution be delivered to the Foundation no later than December 31, 2020.

If you have any questions or need to contact me, I can be reached at _____.

Thank you for your assistance in this matter.

Sincerely,
