**IRA CUSTODIAN INSTRUCTION LETTER**

(Sent from Donor to Custodian Requesting IRA Rollover)

--Sample Language, if needed--

(Date)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Subject: Request to Initiate IRA Charitable Qualified Distribution**

Dear IRA Custodian,

Federal law permits the account holder of an IRA who is 70 ½ or older to make a Qualified Charitable Distribution (QCD) directly from their IRA to a qualified public charity.

Please accept this letter as my request to make a Qualified Charitable Distribution (QDC) from my Individual Retirement Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as provided by Sec. 408(d)(8) of the Internal Revenue Code.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ payable to: Archdiocese of Indianapolis. Please include my name in the memo line of the check. Please mail the check to:

Archdiocese of Indianapolis

Attn: Christy Shepherd

1400 N. Meridian Street

Indianapolis, IN 46202

It is my intention that the above listed gift be treated as a QCD. Please \_\_\_\_ **do** \_\_\_\_\_\_ **do not** use this to satisfy, in whole or in part, my Required Minimum Distribution (RMD) in the year of transfer.

In your transmittal to the Archdiocese of Indianapolis, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention that this transfer qualify for the 2021 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2021.

If you require any further documents, please forward those to me for my signature. Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

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Print name of IRA owner Date

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Signature of IRA owner Date