

Sample IRA Distribution Letter Instructions:

First, contact your IRA administrator and see if they have a form that you can use to make an IRA direct charitable gift request. If that is not available, the following page offers a sample letter that can be used to request a direct distribution from an IRA to Harding Fine Arts Academy Foundation.

You may print the sample letter and simply fill in the blanks by hand or use software like Adobe Acrobat to fill it in electronically.

Fill in the blanks as follows:

- 1) Enter the name and address of your IRA custodian/administrator.
- 2) Enter the date.
- 3) Enter your IRA account number.
- 4) Enter the amount you wish to transfer to Harding Fine Arts Academy Foundation.
- 5) Briefly name the purpose of the gift whether it is for general charitable use or for a specific program or activity.
- 6) Include a phone number or email address where you can be contacted.
- 7) Sign the letter, print your name as the Plan Owner, and include your return mailing address.

You may want to keep a copy of the letter for your records.

IRA Company Name and Address

Date

**RE: Request for charitable distribution from my
Individual Retirement Account for the 20 Tax Year.**

Dear IRA Custodian:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account, Account # _____ as authorized by Section 408(d)(8) of the Internal Revenue Code and the Protecting Americans from Tax Hikes Act of 2015.

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

Harding Fine Arts Academy Foundation
3333 N Shartel Ave
Oklahoma City, OK 73118
(405) 702-6939
EIN: #83-4575379

In your transmittal to the above-named organization, please communicate my name and address as the donor of record in connection with this transfer. Also, please indicate that the purpose of the gift is:

(Examples: general charitable purposes without restrictions; building maintenance; Teacher Resource Fund, etc.)

Please copy me on your transmittal.

It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the **20**____ tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative this distribution be postmarked no later than **December 31, 20**_____.

If you have any questions or need to contact me, I can be reached at _____.
Thank you for your assistance and prompt attention to this matter.

Sincerely,

Signature

Street Address

_____, Plan Owner
Print Name

City, State, Zip Code