**Sample Letter of Instruction from Plan Owner to Charity Informing of**

**Forthcoming Qualified Charitable Distribution from Plan Administrator**

Attn: Planned Giving Director

Foundation for Vancouver Public Schools

PO Box 6039

Vancouver, WA 98668-6039

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 payable to your organization in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_ from my plan trustee/administrator, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

(name of trustee/administrator)

It is my intent to comply with the provisions of The Protecting Americans from Tax Hikes (PATH) Act of 2015.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the date and amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

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

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

 (phone) (email)

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (signature) (print name)

\_\_\_\_\_\_\_\_\_\_\_\_

(date)