STEVENSON

Sample Qualified Charitable Distribution Letter Template

To make the qualified charitable distribution (QCD) , you will need to contact your IRA administrator to request that the QCD be made directly to the Stevenson School. Please note that an IRA distribution made directly to you as the IRA owner does not count as a QCD—the distribution from your IRA needs to be made directly to the charity.

The following is a template of a Distribution Request Letter you can provide to your IRA administrator.

Please contact Kristina Morton, Advancement Services Administrator, at kmorton@stevensonschool.org or call 831-625-8311 if you have any questions or to let us know you initiated the distribution request.

[Your Name]
[Your Address]
Date

[Name of IRA administrator]
[IRA Administrator Address]

RE: Request for a Qualified Charitable Distribution or Charitable Rollover from IRA

Dear IRA administrator:

Please accept this letter as my request to make a qualified charitable distribution, also known as a charitable rollover from my Individual Retirement Account #[_____] as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of $[_____] payable to Stevenson School (EIN# 94-12187450) in Pebble Beach, CA and mail it to:

Stevenson School (EIN# 94-12187450)
Payable to [insert name of fund]
3152 Forest Lake Rd.
Pebble Beach, CA 93953

In your transmittal, please include my name and address as the donor of record in connection with the distribution and copy me.

It is my intention that this distribution qualifies for exclusion from my taxable income during the [insert tax year].

If you have any questions or need to contact me, I can be reached at [insert your contact information].

Thank you,

[Your Name and Email]