



HelpMeSee provides this sample language for your use in writing your charitable IRA distribution request letter to your IRA Administrator. We hope you will also use the sample letter to write to us informing us of your forthcoming charitable IRA distribution. Notifying us of your intention allows us to provide you with the proper tax acknowledgement required by the IRS.

**Sample Request Letter from Plan Owner to Administrator for a
Charitable Distribution from an IRA**

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution in the amount of \$ *[amount]* from my Individual Retirement Account # *[account number]* as provided by the American Taxpayer Relief Act and the Internal Revenue Code, Section 408(d)(8), regarding qualified gifts from Individual Retirement Accounts (IRA).

**Distributions should be made payable to:
HelpMeSee, 20 West 36th Street, Floor 4, New York, NY 10018, taxpayer ID 27-3207754.**

My contact at HelpMeSee is Steven Moore, who can be reached by calling 212-221-7682 or by e-mail at steven@helpmeseesee.org.

In your transmittal to HelpMeSee, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have any questions or need to contact me, I can be reached at *[telephone #]*. Thank you for your assistance in this matter.

Sincerely,

[Plan owner]

We would be happy to answer any questions you may have about this material.
Please call Steven Moore at 212-221-7682.



**Sample Letter of Intent Informing HelpMeSee of a Forthcoming
Charitable Distribution from IRA**

**Steven Moore
HelpMeSee
20 West 36th Street
Floor 4
New York, NY 10018**

Dear Steven,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to HelpMeSee in the amount of \$ *[amount]* from my plan trustee/administrator, *[name of IRA trustee/administrator]*.

It is my intention to comply with the requirements of American Taxpayer Relief Act and the Internal Revenue Code, Section 408(d)(8), regarding qualified gifts from Individual Retirement Accounts (IRA) in connection with this gift.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by HelpMeSee in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I receive an acknowledgement of this distribution, I understand that there is no federal charitable income tax deduction for this distribution.

If you have any questions or need to contact me, I can be reached at *[telephone #]*.

Sincerely,

[Your name]

We would be happy to answer any questions you may have about this material.
Please call Steven Moore at 212-221-7682.