

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

Re: Request for Qualified 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 \$ _____ from my Individual Retirement Account # _____ as provided by the Internal Revenue Code, Section 208, regarding qualified gifts from Individual Retirement Accounts (IRA).

Distributions should be made payable to:
NAMI OHIO (National Alliance on Mental Illness of Ohio), 1225 Dublin Road, Suite 125, Columbus OH 43215, taxpayer ID 31-1073968.

My contact at NAMI Ohio is Stacey Smith, who can be reached by calling 614-224-2700 or by e-mail at stacey@namiohio.org.

In your transmittal to NAMI Ohio, please include 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 _____.

Sincerely,

Signature

Name