

IRA Qualified Charitable Distribution
Sample letter to plan administrator or custodian

Date

IRA Custodian/Administrator
ADDRESS

Re: ACCOUNT NUMBER; Request for Qualified Charitable Distribution from IRA

Dear Sir or Madam:

Please accept this letter as my request to make a Qualified Charitable Distribution from my Individual Retirement Account # _____ under Section 1201 of the Pension Protection Act of 2006, as extended by the Protecting Americans from Tax Hikes (PATH) Act of 2015, and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of _____ Dollars (\$) payable to the University of Virginia Medical School Foundation (tax ID 23-7173411) and mail it to the following address for receipt on or before December 31, 2024:

If sent via US Postal Service:

University of Virginia
ATTN: Spring Dodge
P.O. Box 400807
Charlottesville, VA 22904-4807

If sent by overnight delivery:

University of Virginia
ATTN: Spring Dodge
2420 Old Ivy Road
Charlottesville, VA 22903

In your transmittal to the University of Virginia Medical School Foundation, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal at the following address:

NAME
ADDRESS

I have confirmed with the University of Virginia Medical School Foundation that it is a qualified recipient of distributions under the provisions noted and is neither a supporting organization under Section 509(a)(3) of the Internal Revenue Code nor a donor-advised fund.

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

Sincerely,

NAME