**Sample Letter of Instruction from Donor to IRA Provider**

[DATE]

[NAME OF IRA PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

(Call your plan provider to determine the most efficient way to send this letter of instruction)

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable contribution from my Individual Retirement Account Number: **[insert account number].**

Please issue a check in the amount of $ \_\_\_\_\_\_\_\_\_\_\_ payable to the charitable organization at the address below:

Alpha Xi Delta Foundation

8702 Founders Road

Indianapolis, IN 46268

In your transmittal to the charity, **please indicate my name and address as the donor of record and copy me on your correspondence in connection with this transfer.** It is my intention to have this transfer qualify for exclusion during the XXXX tax year.

Alpha Xi Delta Foundation Tax Identification Number (EIN) is 35-6053701.

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

Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

[DONOR NAME]