

**SAMPLE Charitable IRA Rollover Request to Plan Administrator**

\_\_\_\_\_  
IRA Company Name and Address

\_\_\_\_\_  
(Date)

RE: Request for charitable distribution from **my Individual Retirement Account for the 2023 Tax Year**

Dear IRA Custodian:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ as authorized by Section 408(d)(8) of the Internal Revenue Code and the Protecting Americans from Tax Hikes Act of 2015.

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

Rudolf Steiner School of Ann Arbor  
2230 Pontiac Trail  
Ann Arbor, MI 48105

If you want to make an electronic transfer, please contact the Development office at 734-669-9394 x27 for details. In your transmittal to the above-named organization, please communicate my name and address as the donor of record in connection with this transfer. Also, please indicate that the purpose of the gift is:

- Annual Fund - supporting faculty professional development and tuition assistance for families
- Endowment Fund - supporting the future of RSSAA
- Stability Fund - paying-off long-term debt
- Other designation (as discussed with the Development Office): \_\_\_\_\_

Please copy me on your transmittal. It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the 2023 tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2023.

For your reference, the Federal Tax Identification number for the Rudolf Steiner School of Ann Arbor is 38-2242069.

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

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

Sincerely,

\_\_\_\_\_  
Signature

Name \_\_\_\_\_

Address \_\_\_\_\_