

Sample Letter of Instruction from Donor to IRA Provider

Date

Name

Address

City, State, Zip

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 (IRA) Number: [insert account number] as provided by the Tax Increase Prevention 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 \$ [] payable to Baylor Scott & White Dallas Foundation at address below. Their tax ID is 75-1606705.

Baylor Scott & White Dallas Foundation
301 N. Washington Avenue
Dallas, TX 75246

In your transmittal to the Foundation, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the [] tax year. If you have any questions or concerns regarding this request, I can be reached at [PHONE AND EMAIL ADDRESSES]. Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

[DONOR NAME]