

**Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to the Jewish Federation of Western Massachusetts**

December \_\_, 2015

Custody Agent:

Address:

**RE: Request for Charitable Distribution from Individual Retirement Account # \_\_\_\_\_  
in the name of \_\_\_\_\_**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_.

Please issue a check in the amount of \$ \_\_\_\_\_ [not to exceed \$100,000] payable to "The Jewish Federation of Western Massachusetts" and mail it directly to the following address:

Jewish Federation of Western Massachusetts  
1160 Dickinson Street  
Springfield, MA 01108  
Attention: Linda Minoff, Endowment Director

In your transmittal to the Jewish Federation of Western Massachusetts, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of \_\_\_\_\_ [i.e. Federation Annual Campaign; Endowed Fund]. Please copy me on your transmittal.

It is my intention to make this transfer in December 2015 and elect to treat it as a qualified charitable distribution effective for the 2015 tax year.

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

Plan Owners Address: