*Individual IRA Owner/Donor Name*

*Street Address*

*City, State Zip Code*

*Tel: ###-###-####*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Month, day)*, 2019

*Name of IRA Trustee/Custodian*

*Street Address*

*City, State Zip Code*

**RE: Letter of Instruction – Request for Qualified Charitable Distribution from IRA**

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,

Please accept this letter as my written request to make a direct qualified charitable distribution from my Individual Retirement Account (IRA), payable to Sagepoint Senior Services Foundation, as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Sagepoint Senior Services Foundation is a qualified 501(c)(3) charitable organization. Their Federal Tax Identification number is 20-1666771. Please issue a check in the amount of $*(enter amount)* directly payable toSagepoint Senior Services Foundation.

Mail it to: Sagepoint Senior Services Foundation

Attention: Joyce Riggs

10200 La Plata Road

LaPlata, MD 20646

[If mailed directly to your financial advisor or tax-exempt nonprofit organization, INSERT the following sentence.] In your transmittal, please note my name and address as the donor of this charitable contribution, and copy me on the transmittal at my home address on record.

It is my itention that this charitable distribution qualifies for exclusion from my taxable income, during the *(year)* tax year. Therefore, it is imperative that this qualified charitable distribution check request be processed and mailed at your earliest convenience.

If you have any questions, please contact my financial advisor, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ at ###-###-####. Thank you for your prompt attention to this matter.

Sincerely,

Individual IRA Owner/Donor Name