*Individual IRA Owner/Donor Name*

*Street Address*

*City, State Zip Code*

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

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

*(Month, day)*, 2019

Sagepoint Senior Services Foundation

10200 La Plata Road

La Plata, MD 20646

Attention: Joyce Riggs, Foundation President

**RE: Charitable Distribution from IRA**

Dear Sagepoint Senior Services Foundation,

Please accept this enclosed check in the amount of $ *(amount)* from *(IRA trustee/custodian institution)*, the Individual Retirement Account (IRA) trustee/custodian, payable to Sagepoint Senior Services Foundation, Federal Tax ID Number 20-1666771, as a direct charitable distribution from my Individual Retirement Account ending in #last four digits, 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.

The purpose of this charitable donation is for (*general fund or restricted fund - a fund that can only be used for specific purposes.)*

It is my intention that this charitable distribution qualifies for exclusion from my taxable income, during the *(year)* tax year. Therefore, it is imperative that this distribution check be deposited no later than Dec. 31, *(tax year.)*

Please provide me with written acknowledgment (such as a receipt or a letter) for this charitable distribution for my individual tax return records, showing the name of the charity, the date of the contribution, and the amount of the contribution. Please also include a statement that no goods or services were provided by the organization in exchange for the contribution.

If you have any questions, please contact my financial advisor, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ at ###-###-####. Thank you.

Sincerely,

Individual IRA Owner/Donor Name

Enclosure: Charitable Distribution Check