

# Sample Letter of Instruction from Donor to IRA Provider

[DATE]

[NAME OF IRA PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

(Call your plan provider to determine the most efficient way to send this letter of instruction)

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 under Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986, and made permanent under the Consolidated Appropriations Act of 2016. My account Number is:

**[INSERT ACCOUNT NUMBER]**

Please issue a check in the amount of \$\_\_\_\_\_ payable to Luther Seminary, Inc. at the following address:

Luther Seminary  
PO Box 860747  
Minneapolis, MN  
55486-0747

In your transmittal to the charity, please state my name and address as the donor of record regarding this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the 20\_\_ tax year. Therefore, it is imperative that this distribution be completed before December 31, 20\_\_.

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]



## SEMINARY RELATIONS

2481 COMO AVENUE, ST. PAUL, MN 55108

888-358-8437 | [luthersem.edu](http://luthersem.edu)