Qualified Charitable Distributions (QCD)

Giving From Your IRA

Ready to Notify your IRA Administrator?

Use this sample Distribution Request Letter to get started.

[Your Name]
[Your Address]

Date

[Name of IRA administrator]
[IRA Administrator Address]

RE: Request for a Qualified Charitable Distribution or Charitable Rollover from IRA

Dear [Name of IRA administrator]:

Please accept this note as my request to make a qualified charitable distribution, also known as a charitable rollover from my Individual Retirement Account #[_____] 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.

Please issue a check in the amount of $[_____] payable to The Vermont Community Foundation and mail it to:

Vermont Community Foundation
3 Court Street, Middlebury, VT 05753 | Philanthropy@vermontcf.org | EIN: 22-2712160

In your transmittal, include my name and address as the donor of record. Please also include a note that states that funds are intended for [_____ *include name of existing fund or that it is to create a new designated/ discretionary fund* _____] and copy me.

It is my intention that this distribution qualify for exclusion from my taxable income during the [insert tax year].

If you have any questions or need to contact me, I can be reached at [insert contact information].

Thank you.

[Your Name and Email]