**IRA Charitable Distribution Instructions and Letter Template**

If you have a checkbook associated with your IRA account, simply write a check and mail it to El Camino Health Foundation at the address noted below. Per IRS rules, if you are making the donation to meet your minimum distribution requirement, the check must be cashed by December 31.

If you would prefer to process a contribution from your IRA through your online account access, please call your IRA custodian’s customer service representative line to learn if this is possible and request instructions on how to accomplish the transfer.

Alternatively, here is a one-page letter pre-filled with the information you need to make a distribution to El Camino Health Foundation. Simply add the date and your information, print the letter, and mail it to your retirement account provider. Please delete these instructions before printing the letter. Here, for your convenience, are the addresses of two of the most popular retirement account providers:

Attn: Retirement Distributions Charles Schwab & Co., Inc.
Fidelity Investments P.O. Box 982600
P.O. Box 770001 El Paso, TX 79998-2600
Cincinnati, OH 45277-0035



**[DATE]**
RE: Request for Direct Qualified Charitable Distribution from IRA

Dear IRA administrator:

Please accept this letter as my request to make a direct qualified charitable distribution from my individual retirement account number **[insert number here]** as authorized under Sec. 408(d)(8) of the Internal Revenue Code, as amended.

Please issue a check in the amount of $**[amount]**, payable to El Camino Health Foundation and mail it to:

El Camino Health Foundation

Dept. No. 05868

PO Box 885868

Los Angeles, CA 90088-5868

The qualified charitable organization’s federal tax identification number is: 94-2823235

In your transmittal to the above-named charitable organization, please memorialize my name and address as the donor of record in connection with this transfer and copy me on the transmittal at the address below.

It is my intention that this gift complies with IRC 408(d)(8). It is also my intention to have this transfer qualify during this tax year.

If you have any questions or concerns regarding this request, I can be reached at **[Your Phone Number]** or **[Your Email Address]**.

Thank you for your prompt attention to and assistance in this matter.

Sincerely,

**[Your First and Last Name]**
**[Your Address]**
**[Your City, State ZIP]**
**[Your Phone Number]**