

# SAMPLE REQUEST FROM PLAN OWNER TO IRA ADMINISTRATOR FOR 2022 CHARITABLE DISTRIBUTION

[Donor Name]  
[Donor Address]

\_\_\_\_\_  
\_\_\_\_\_, 2022

[Name of IRA Administrator]  
[IRA Administrator Address]  
[IRA Administrator phone and email]

RE: Request for Charitable Distribution from IRA

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution 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 St. Bede Academy and mail it to:

St. Bede Academy  
Development Department  
Attn: Julia Yaklich  
24 West US Hwy 6  
Peru, IL 61354

For wire or direct bank transfer of funds please note the following: • Receiver ABA: 071902043, Bank Name: LaSalle State Bank, Account #: 4502396 • Please include my name as donor in the reference

St. Bede Academy's tax identification number is 36-218-2109.

In your transmittal to St Bede, please include my name and address as the donor of record in connection with this distribution. Please copy both me and St. Bede on your transmittal.

It is my intention that this distribution qualify for exclusion from my taxable income during the 2022 tax year. Therefore, it is imperative that this distribution be delivered to St. Bede no later than December 31, 2022.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_.

Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_

c.c. Julia Yaklich, St. Bede Academy [gyaklich@st-bede.com](mailto:gyaklich@st-bede.com)