

Sample Letter of Instruction from Donor to IRA Provider Instructing IRA Custodian to Transfer Funds to Baptist Homes Foundation:

[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 Number **[insert account number]**, as provided by the Tax Increase Prevention Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$**[insert amount]** payable to BAPTIST HOMES FOUNDATION [IRS Tax Identification Number 25-1469243] at the following address:

BAPTIST HOMES FOUNDATION
489 Castle Shannon Boulevard
Pittsburgh, PA 15234

In your transmittal to BAPTIST HOMES FOUNDATION, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the **[insert year]** tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, **[insert year]**.

If you have any questions or concerns regarding this request, I can be reached at [YOUR PHONE NUMBER AND E-MAIL ADDRESSES].

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

Sincerely yours,

[DONOR NAME]

cc: Erin Engel, Baptist Homes Foundation