

## **Simple IRA Distribution Letter for use with Required Minimum Distribution (RMD):**

First, contact your IRA administrator and see if they have a form that you can use to make an IRA direct charitable gift request. If that is not available, the following page offers a simple letter that you can use to request a direct distribution from an IRA (Individual Retirement Account) to The Ohio Masonic Home Foundation. (This sort Required Minimum Distribution (RMD) gift is only available to individuals who are over age 70 ½.)

You may print the letter on the following page and simply fill in the blanks by hand.

Fill in the blanks as follows:

- 1) Enter the name and address of your IRA custodian/administrator.
- 2) Enter the date.
- 3) Enter your IRA account number.
- 4) Enter the amount you wish to transfer to The Ohio Masonic Home Foundation
- 5) We have included our address and legal information for your convenience.  
If you need other information, please call us directly.
- 6) Briefly name the purpose of the gift whether it is for general charitable use or for a specific program or activity.
- 7) Include a phone number or email address where you can be contacted.
- 8) Sign the letter, print your name as the Plan Owner, and include your return mailing address.

You may want to keep a copy of the letter for your records.

The Ohio Masonic Home Foundation happily accepts these type of gifts to fulfill our mission. We will provide you with an appropriate gift receipt letter by mail.

Remember, this sort of gift is NOT income to you and, therefore, it is NOT tax-deductible. Nonetheless, the gift counts toward your Required Minimum Distribution (RMD). This is a great option for anyone who does not itemize charitable deductions and/or anyone who does not want to incur that additional RMD income.

\_\_\_\_\_  
*IRA Company Name and Address*

\_\_\_\_\_  
*(Date)*

**RE: Request for charitable distribution from my Individual Retirement Account for the 20 Tax Year**

Dear IRA Custodian:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account, Account # \_\_\_\_\_ as authorized by Section 408(d)(8) of the Internal Revenue Code and the Protecting Americans from Tax Hikes Act of 2015.

Please issue a check in the amount of \$ \_\_\_\_\_ payable to The Ohio Masonic Home Foundation.

*The Ohio Masonic Home Foundation (EIN: 31-1451818)*

*2655 W. National Road*

*Springfield, OH 45504*

In your transmittal to The Ohio Masonic Home Foundation, please communicate my name and address as the donor of record in connection with this transfer. Also, please indicate that the purpose of the gift is: \_\_\_\_\_

*(Examples: Greatest Need Fund, Endowment, Masonic Financial Assistance, Aging Respectfully Resident Care, etc.)*

Please copy me on your transmittal.

It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the **20** tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative this distribution be postmarked no later than **December 31, 20**.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_. Thank you for your assistance and prompt attention to this matter.

Sincerely,

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Home Address*

\_\_\_\_\_, Plan Owner  
*Print Name*

\_\_\_\_\_  
*City, State, Zip Code*