

Westmark School

THE DIFFERENCE IS BRILLIANT

SAMPLE LETTER

Sample letter from IRA account owner to IRA administrator requesting a Charitable Distribution be made from an Individual Retirement Account:

(Date)
(IRA Administrator Name)
(Street Address)
(City, State and Zip Code)

RE: Request for Charitable Distribution from Individual Retirement Account (IRA)

Dear (IRA Administrator Name),

I am requesting a direct charitable distribution from my Individual Retirement Account #_____ as provided by The Protecting Americans from Tax Hikes 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 \$_____._____ payable to Westmark School and mail to the following address:

Westmark School
Attn: Elizabeth Curtis / Advancement
5461 Louise Avenue
Encino, CA 91316

Send the check directly to Westmark School at the above address. Please include my name on the check or with accompanying correspondence, and send me a copy of the transfer for my records. Questions for Westmark School should be directed to Elizabeth Curtis, Director of Advancement at 818-986-5045 ext. 316. The Federal Tax ID number of Westmark School (aka Learning With A Difference, Inc.) is 95-4616645.

You may contact me at () _____-_____ if you have any questions. Thank you for your assistance.

(Your Signature)
(Your Printed Name)
(Your Street Address)
(Your City, State and Zip Code)