

IRA Custodian Instruction Letter

(SENT FROM DONOR TO CUSTODIAN REQUESTING IRA ROLLOVER)

Sample language, if needed

(Date) _____

Subject: Request to Initiate IRA Charitable Qualified Distribution

Dear IRA Custodian,

Federal law permits the account holder of an IRA who is 70 ½ or older to make a Qualified Charitable Distribution (QCD) directly from their IRA to a qualified public charity.

Please accept this letter as my request to make a Qualified Charitable Distribution (QCD) from my Individual Retirement Account # _____ as provided by Sec. 408(d)(8) of the Internal Revenue Code.

Please issue a check in the amount of \$ _____ payable to: Diocese of Owensboro.

Please include my name in the memo line of the check. Please mail the check to:

Diocese of Owensboro
Attn: Valeria Vessels
Development Office
600 Locust Street
Owensboro, KY 42301

It is my intention that the above listed gift be treated as a QCD. Please ____ do ____ do not use this to satisfy, in whole or in part, my Required Minimum Distribution (RMD) in the year of transfer.

In your transmittal to the Diocese of Owensboro, 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 intent that this transfer qualify for the 2022 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2022.

If you require any further documents, please forward those to me for my signature. Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

Print name of IRA owner: _____ Date: _____

Signature of IRA owner: _____ Date: _____

Diocese of Owensboro

Development Office

600 Locust Street • Owensboro, KY 42301

owensborodiocese.org



Valeria Vessels

Director of Development

270-852-8348

valeria.vessels@pastoral.org