Your Name

Address

City, State Zip

# Date

Financial Institution

Institution Address

Re: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

It is my intention to have this transfer qualify for exclusion during the (insert year) tax year. If necessary, Mary Immaculate’s Employer Identification Number (EIN) is: **04-2857794**

Please issue a check in the amount of $ \_\_\_\_\_\_\_\_\_\_\_ payable to Mary Immaculate Health/Care Services and mailed to Mary Immaculate, 172 Lawrence Street
Lawrence, MA 01841

In your transmittal to Mary Immaculate:

1. indicate my name and address as the donor of record
2. indicate check is to be designated to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please also send me a copy of your correspondence in connection with this transfer.

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

Thank you for your assistance in this matter.

Sincerely,

Your Name