

Sample letter to notify your IRA custodian:

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 distribution from my Individual Retirement Account # _____

Please issue a check in the amount of \$_____ payable to **Unbound** and mail it to:

Unbound Attn: Dept 5171
P.O. Box 650020
Dallas, TX 75265-0020

Unbound tax identification number is 43-1243999.

In your transmittal to Unbound, please include my name and Unbound member ID "ASC _____" as the donor of record in connection with this distribution.

It is my intention to have this transfer qualify for the 20__ tax year. Therefore, it is imperative that 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

[provide your telephone number or email address].

Thank you for your assistance in this matter.

Sincerely,

Your Name
Your Address

Disclaimer: This information is not intended as legal, accounting or other professional advice. For assistance in legacy planning, consult an attorney for legal advice or the services of a qualified professional.