

Letter to IRA Administrators for 2020 Gifts

To Whom It May Concern:

Please make a direct charitable distribution from my IRA Account as indicated below:

IRA Administrator: _____

Account Number _____

Name(s) on Account _____

Distribution Amount \$ _____

It is my intention to have this transfer qualify for the 2020 tax year and fulfill all or part of my required minimum distribution.

This distribution will not be used to establish any deferred/life income plan nor to any donor advised fund, supporting organization, family foundation or other entity that is not qualified to receive a charitable IRA contribution.

Please make the check payable to: _____

Please mail the check to: _____

Tax ID: _____

Please list my name and address as the donor of the distribution, and please send me a copy of the correspondence with the recipient indicated above.

Sign and Date

Sign and Date

PRINT Name:

PRINT Name:

Date of Birth

Date of Birth

Donor Address:

Donor Phone Number:

Please deliver/mail the ORIGINAL Letter to your IRA Administrator!

If you have any questions regarding the use or completion of this form, please contact the Financial Services Department of the Archdiocese of Portland at (503) 233-8392.