

## Letter to IRA Administrators for 2021 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 2021 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.