

IRA Qualified Charitable Distribution Request Form

Request from Plan Owner to Administrator for Charitable Distribution from an IRA to The Diocese of Kansas City-St. Joseph, MO for 2021 Tax Year

[Name and Address of IRA Administrator]

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ as provided by the Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408 (d) (8) of the Internal Revenue Code of 1986, as amended and extended.

Please issue a check in the amount of \$_____ payable to "The Diocese of Kansas City-St. Joseph, MO," c/o Laura Gray at P.O. Box 419037, Kansas City, MO 64141. TAX ID 44-0546494. Please designate my gift as follows for [Parish, School, Annual Catholic Appeal, or other parish or diocesan ministries using full name and address]:

In your transmittal of funds to the charity, please note my name and address as the donor of record in connection with this transfer and transmit a copy of this request form with your payment. Please copy me on your transmittal.

I intend that this transfer qualify for exclusion from income during the 2021 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2021. Please do not withhold any income tax from my distribution.

If you have any questions or need to contact me, I can be reached at telephone # _____. Thank you for your assistance in this matter.

Sincerely,

(Signature of Plan Owner)

(Date)

Printed Name and Address:

Instructions to Donor:

1. Please give the original signed letter of authorization to your plan administrator/trustee.
2. Please mail/fax/email a copy to the diocese at FAX 816-756-5089, gray@diocesekcsj.org, or Stewardship & Development, Attn: Laura Gray, Diocese of Kansas City-St. Joseph, PO Box 419037, KCMO 641416037
3. Please mail/email a copy to Sue Nichols, St. Mark's at snichols@stmarksparish.com