

Sample Email from Donor Informing the Foundation for Economic Education of Forthcoming Charitable Distribution from IRA Trustee/Administrator

To: Carl Oberg <coberg@fee.org>

Dear Mr. Oberg:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to the Foundation for Economic Education in the amount of \$_____ from my plan trustee/administrator, _____ [name of IRA trustee/administrator].

It is my intention that this gift comply with the “qualified charitable distribution” requirements of the Internal Revenue Code.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by the Foundation for Economic Education in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I receive an acknowledgement of this distribution, I understand that there is no federal charitable income tax deduction for this distribution.

[Optional]: I intend for my gift to the Foundation for Economic Education to be used for the following purpose: _____ [gift designation, if any].

If you have any questions or need to contact me, I can be reached at _____ [telephone #].

Sincerely,
[Your name]