



## **Sample Letter to direct a qualified charitable distribution from an IRA to SHARE!**

Date: \_\_\_\_\_

Name of IRA Custodian: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Re: Charitable IRA distribution to Emotional Health Association

Dear Custodian, Trustee or Plan Administrator:

I hereby direct you to make a qualified charitable distribution (a “charitable IRA rollover”) of \$\_\_\_\_\_ to Emotional Health Association, a 501(c)(3) public charity that is qualified to receive charitable IRA rollovers under the provisions of the Emergency Economic Stabilization Act of 2008 (extending a provision of P.L. 109-280). This rollover should be made from the (*name on IRA account*), account number \_\_\_\_\_. It is my intent to make this charitable IRA rollover for tax year 20\_\_\_\_. I further represent as follows:

- (1) I am over 70 ½ years of age. My date of birth is: \_\_\_\_\_.
- (2) I will not receive any benefits from Emotional Health Association as a result of this rollover. This rollover is not directed to a charitable remainder trust, lead trust, gift annuity, pooled income fund or other non-qualified use, nor is it

directed to a donor advised fund, supporting organization, family foundation, or purpose that is not qualified to receive a charitable IRA rollover.

- (3) I understand that a charitable IRA rollover is currently available only for tax year 2024 and is limited to no more than \$105,000 in total from my IRA or all of my IRAs combined.
- (4) I will not incur any federal income tax liability as a result of this rollover therefore I elect out of withholding for this rollover. I will not accept any personal distribution of funds intended for this charitable IRA rollover.
- (5) I understand that this charitable IRA rollover can count toward my required minimum distribution(s) for the year of the gift.

Thank you for your prompt attention to this matter. Please contact me immediately with any questions or the reasons for any substantial delay in completing this rollover.

Sincerely,

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Donor's name as listed on the IRA

**This charitable IRA rollover to Emotional Health Association should be delivered to:**

Emotional Health Association

6666 Green Valley Circle

Culver City, CA 90230

Attention: Brian Ulf

Phone: (310) 846-5270