

Sample Letter of Instruction from Donor to Traditional IRA Provider Instructing the Traditional IRA Custodian to Transfer Funds to the Catholic Diocese of Pittsburgh

[DATE]

[NAME OF DONOR'S TRADITIONAL IRA PROVIDER]

[ADDRESS OF DONOR'S TRADITIONAL IRA PROVIDER]

[CITY, STATE, ZIP OF DONOR'S TRADITIONAL IRA PROVIDER]

(Call your plan provider to determine the most efficient way to send this letter of instruction)

Re: Request for Qualified Charitable Distribution from my Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable contribution from my Traditional Individual Retirement Account, Account Number: [insert account number], as provided by the Tax Increase Prevention Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of [\$ insert amount] payable to the CATHOLIC DIOCESE OF PITTSBURGH. Next, direct that check to: Your Name, Your Address, City State and Zip Code. I will then forward the check to the CATHOLIC DIOCESE OF PITTSBURGH with recommendations on the charitable purpose(s) for which the gift is to be used.

For your information, the IRS Tax Identification Number of the CATHOLIC DIOCESE OF PITTSBURGH is 25-1056-201*. The address of the CATHOLIC DIOCESE OF PITTSBURGH is: 2900 Noblestown Rd, Pittsburgh, PA 15205.

For your records, please note that my name is [your name] and my address is: [your address, city, state and zip code] and that I am the donor of record in connection with this transfer. It is my intention to have this transfer qualify during the current tax year. Thus, it is imperative that this distribution be postmarked no later than December 31, of this year.

If you have any questions or concerns regarding this request, I can be reached at [insert your phone number and e-mail address]. Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

[DONOR'S NAME]

cc: Paul Stabile, Director of Planned Giving, Stewardship Office, Catholic Diocese of Pittsburgh

* Other tax id numbers are available for Diocese of Pittsburgh Foundation, Our Campaign for the Church Alive! and for your parish.. Please direct questions to 412-456-3055.

Sample Letter from Donor to the Catholic Diocese of Pittsburgh notifying it of the Traditional IRA Rollover contribution, with payment and allocation instructions

[DATE]

[NAME OF DONOR]

[ADDRESS OF DONOR]

[CITY, STATE AND ZIP CODE OF DONOR]

Mr. Paul Stabile
Director of Planned Giving
Office for Stewardship
Catholic Diocese of Pittsburgh
2900 Noblestown Rd
Pittsburgh, PA 15205

Re: Qualified Charitable Distribution from my Traditional IRA for the current calendar year

Dear Mr. Stabile:

Enclosed is my Qualified Charitable Distribution from my Traditional IRA for this year in the amount of [*insert amount*] as allowed the Tax Increase Prevention Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

This check is a direct transfer made payable to the CATHOLIC DIOCESE OF PITTSBURGH by my Traditional IRA provider/custodian, qualifying it as a direct Traditional IRA Rollover to charity.

This contribution is to be used to support the general mission of the CATHOLIC DIOCESE OF PITTSBURGH in the following way(s):

- WHERE THE NEED IS GREATEST
- OTHER _____

Please provide me with the appropriate acknowledgement categorizing this gift as a charitable Traditional IRA Rollover for my tax reporting purposes. Feel free to contact me at [*insert your phone number and e-mail address*] if you have any questions.

Sincerely yours,

[DONOR'S NAME]