



**SAMPLE LETTER TO DIRECT IRA ROLLOVER TO  
Jewish Federation of Greater Orange County**

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

To: (Name of Company/IRA Administrator) \_\_\_\_\_

From: (Your Name) \_\_\_\_\_

Re: Request for Charitable Distribution from Individual Retirement Account

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ \_\_\_\_\_ (not to exceed \$100,000) payable to **The Jewish Federation of Greater Orange County** and mail it directly to the following address:

Jewish Federation of Greater Orange County  
292 North Street  
Newburgh, NY 12550

Jewish Federation of Greater Orange County's Tax ID number is: **14-1584342**

In your transmittal to Jewish Federation, please give my name and address as the donor of record in connection with the transfer. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 20\_\_\_\_ tax year.

I certify that I am 70 ½ years old or older and I am eligible to have a Qualified Charitable Distribution (QCD) from my IRA.

If you have any questions, I can be reached at (\_\_\_\_) \_\_\_\_\_.

Thank you for your assistance.

Sincerely,  
(Name) \_\_\_\_\_  
(Address) \_\_\_\_\_  
(Address) \_\_\_\_\_