

**Sample Letter from Plan Owner to IRA Custodian to Initiate a QCD/IRA Rollover**

IRA Custodian Name  
Address  
City, State, Zip

RE: Request to Initiate a Qualified Charitable Distribution (QCD) from my IRA

Dear Sir/Madam,

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account, Account # \_\_\_\_\_ as authorized by Sec.1201 of the *Pension Protection Act of 2006*, which was extended permanently in the *Protecting Americans from Tax Hikes 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 \$ \_\_\_\_\_ payable to Physicians for Social Responsibility - Los Angeles at the following address:

Physicians for Social Responsibility - Los Angeles  
617 S. Olive St. Suite 1100  
Los Angeles, CA 90014

Tax ID#: **95-3956136**

When you mail the check to the Physicians for Social Responsibility - Los Angeles, please give my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

It is my intention to have this transfer be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the 20\_\_\_\_ tax year. This QCD will fulfill part or all of my Required Minimum Distribution for this year. Therefore, it is imperative this distribution be postmarked no later than December 31, 20\_\_\_\_.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_.

Thank you for your assistance and prompt attention to this matter.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_, Plan Owner  
Print Name

\_\_\_\_\_  
Home Address

\_\_\_\_\_  
City, State, Zip