

Tri-Valley Haven: Sample Letter to IRA Administrators

March 3, 2023

Financial Institution Name

Address

City, State, Zip

**Re: Request for charitable distribution from IRA**

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 Hike 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 \$ \_\_\_\_\_ payable to Tri-Valley Haven and mail it to:

Tri-Valley Haven  
3663 Pacific Ave  
Livermore, CA 94550  
Attn: Christine Dillman

Tri-Valley Haven is a 501(c)(3) nonprofit with **TAX ID: 94-2462357**.

In your transmittal, please include my name and address as the donor of record in connection with this distribution and indicate the distribution should be used to support Wherever It is Most Needed.

Please copy me on the transmittal at the address below.

It is my intention that this distribution qualify for exclusion from my taxable income during the \_\_\_\_\_ tax year. Therefore, it is imperative that this distribution be delivered to Tri-Valley Haven no later than December 31, \_\_\_\_\_.

Please contact Christine Dillman, Executive Director at Tri-Valley Haven if you need additional information. She can be reached at (925) 667-2707 or [christine@trivalleyhaven.org](mailto:christine@trivalleyhaven.org).

Thank you for your prompt assistance.

Sincerely,

Name of Donor

Address

City, State, Zip

Phone &/or Email