

Sample Instruction Letter

TO: IRA ADMINISTRATOR

Dear Sir or Madam,

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account (IRA), account # _____ . This distribution is intended to be an IRA Charitable Rollover.

Please issue a check in the amount of \$ _____ made payable to The Salvation Army of Central Oklahoma. Here are my mailing instructions to send the check:

Mail the check directly to The Salvation Army:

The Salvation Army of Central Oklahoma
1001 N Pennsylvania Avenue
Oklahoma City, OK 73107

Mail the check back to my home so I may directly deliver the check to the organization.

My home address is: _____

The Salvation Army's tax ID number is 58-0660607 and is a qualified charitable recipient for this transfer. It is my intention to have this transfer be a Qualified Charitable Distribution that will qualify for exclusion from my taxable income during the current tax year.

IMPORTANT

In your transmittal to The Salvation Army of Central Oklahoma, please indicate my name and address as the donor of record in connection with this transfer, and please copy me on your transmittal.

If you have any questions, I can be reached at _____. Thank you for your assistance.

Sincerely,

_____ Owner/Donor Name

_____ Address _____ City/State/Zip