**Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to the Economic Literacy Colorado** \_\_\_, 202\_

Custody Agent

Address

**RE: Request for Charitable Distribution from Individual Retirement Account**

**#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in the name of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_\_\_\_\_\_\_\_\_ as provided by The Trade Facilitation and Trade Enforcement Act of 2015.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (not to exceed $100,000) payable to “Economic Literacy Colorado” and mail it directly to the following address:

Economic Literacy Colorado

1355 S. Colorado Blvd., Suite 506

Denver, CO 80222

Attention: Bill Tortorici – IRA

In your transmittal to **Economic Literacy Colorado**, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [i.e. Economic Literacy Colorado/affiliate and purpose].

Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 202\_ tax year.

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

Thank you for your assistance in this matter.

Sincerely,

Plan Owner Name

Plan Owners Address

For more information, please contact Bill Tortorici at (303) 745-3171 or [bill.tortorici@econlitco.org](mailto:bill.tortorici@econlitco.org).

*Economic Literacy Colorado is not engaged in rendering legal or tax advisory services. The above language is intended solely for general information purposes. For advice and assistance in specific cases, legal counsel should be obtained.*