OLIVE CREST
Strong Families, Safe Kids

IRA PLAN PROVIDER LETTER

Request for a Qualified Charitable Distribution (QCD) from an Individual Retirement Account (IRA)

Date: _____
IRA Provider / Custodian: _____
Address: _____
City, State, ZIP: _____

Re: Request for Direct Charitable Distribution to Olive Crest

To Whom It May Concern:

As the owner of IRA account number _____, I request that you make a direct charitable distribution from my Individual Retirement Account (IRA) to Olive Crest, a qualified charitable organization. Please process this distribution in accordance with the applicable rules for qualified charitable distributions, if eligible.
Please issue a check in the amount of $_____ payable to "Olive Crest" and mail it, along with my name and any identifying information you can include, to:

Olive Crest – Stephen Christensen
2130 E. Fourth Street
Santa Ana, CA 92705
Federal Tax ID (EIN): 95-2877102
Email: Stephen-christensen@olivecrest.org | www.olivecrest.org/estate-giving/

Important instructions

- Please identify me as the donor on the check or accompanying documentation.
- If possible, please include my Olive Crest designation or restriction: _____.
- Please send the distribution directly from my IRA to Olive Crest. I understand that a distribution paid to me and then donated by me may not qualify as a QCD.

If you need additional information to process this request, please contact me at the information below.

Account owner name: _____

Phone / email: _____

Sincerely,

_____
Account owner signature Date

Please consult your IRA custodian and tax advisor to confirm eligibility and applicable requirements. This sample letter is for informational purposes and is not tax, legal, or financial advice.