**Catholic Diocese of St. Petersburg**

**IRA Sample Letter of Instruction – *Diocesan Ministry, Outreach, Service***

Owner/Donor Name

Address

City, State Zip

To: IRA Administrator

(Company Name)

(Company Address)

(Company City, State Zip)

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 as authorized by Section 408(d)(8) of the Internal Revenue Code.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ payable to Diocese of St. Petersburg, Florida for

(Diocesan Ministry Name/Purpose).

Please send the check to the following address: Diocese of St. Petersburg

ATTN: Processing Office

PO Box 40200

St. Petersburg, FL 33743-0200

The Diocese of St. Petersburg is a qualified charitable recipient for this transfer. The tax ID number for the Diocese of St. Petersburg is 59-1213195. It is my intention to have this transfer be a Qualified Charitable Distribution that will qualify for exclusion from my taxable income during the \_\_\_\_\_\_ tax year.

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 in this matter.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date