

SAMPLE LETTER OF INSTRUCTION

Call or directly contact your plan provider to determine the most efficient way to send this Letter of Instruction.

[Today's Date]

[Name of IRA Provider]

[Address]

[City | State | Zip]

RE: Request for Qualified Charitable Distribution from my IRA

Dear [Name],

Please accept this letter as my request to make a qualified charitable contribution from my Individual Retirement Account (IRA) under Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986 and made permanent under the Consolidated Appropriations Act of 2016.

My IRA account number is [insert your account number].

Please issue a check in the amount of \$_____ payable to KEYS Corporation which does business as The KEYS Program. The organization's EIN # 16-1609790. Please mail the check to:

The KEYS Program
308 Sherrill Road, Suite 100
Sherrill, NY 13461

In your transmittal to KEYS Corp, please state my name and address as the Donor of Record in connection with this transfer and copy me on your transmittal.

It is my intention to have this transfer qualify during the [current] tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2____.

If you have questions regarding my request, I can be reached at [phone and email].

Thank you for your prompt attention to and assistance with this charitable transaction.

[Donor Name]

[Donor Address]

[Donor Phone]

[Donor Email]