

THE AYN RAND® INSTITUTE

Tax-Free Charitable Contributions from Individual Retirement Accounts



Sample Letter of Instruction to IRA Custodian for Charitable Distribution

Many IRA custodians will provide you with a form for a Qualified Charitable Distribution. If a self-generated letter of instruction is required, you are welcome to copy and paste the text below and adapt for your purposes. Alternatively, at your request ARI will prepare the letter for you; contact Donor Services at 800-365-6552 or donorservices@aynrand.org.

RE: Qualified Charitable Distribution from Individual Retirement Account

Dear

I wish to make a Qualified Charitable Distribution from my Individual Retirement Account # _____, as provided by the Protecting Americans from Tax Hikes (PATH) Act and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ _____ payable to the Ayn Rand Institute: The Center for the Advancement of Objectivism, tax ID #22-2570926, at the following address:

Attn: Donor Services
Ayn Rand Institute
6 Hutton Centre Drive, Suite 600
Santa Ana, CA 92707

In your transmittal to the charity, please include my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

I intend for this distribution to qualify as a [tax year] gift for tax purposes, and will appreciate your prompt attention to my request. Thank you for your assistance in this matter.

Sincerely,

cc: Donor Services, Ayn Rand Institute