

**Sample Letter of Instruction from Donor to IRA Administrator
for a Gift to Baystate Health Foundation**

[Owner/Donor Name]

[Address]

[City, State, Zip]

[Date]

[Name of IRA Administrator]

[Address]

[City, State, Zip]

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

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 Baystate Health Foundation (Tax ID: 04-3549011), a qualified charitable recipient for this transfer.

My gift should be directed to support the following area: _____ (Greatest Needs; a program such as Heart & Vascular Care or Hospice; or a hospital such as Baystate Children's Hospital or Baystate Franklin Medical Center.”

The check should be mailed to:

Baystate Health Foundation
280 Chestnut Street
Springfield, MA 01199

It is my intention to have transfer be a Qualified Charitable Distribution that will qualify for exclusion from my taxable income for the 2023 tax year.

Important:

Please list my name and address as the donor for the transfer, and please send me a copy of the correspondence with Baystate Health Foundation.

If you have any questions, I may be reached at _____. Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

[Donor Name]