

Request for Qualified Charitable Distribution From IRA

Address of Plan Trustee/Administrator

RE: Request for Charitable Distribution from Individual Retirement Account

Date

To whom it may concern:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # (Account Number).

It is my intent that this gift qualifies for an IRA Charitable Rollover distribution for the 2023 calendar year, as provided for by the Protecting Americans From Tax Hikes Act of 2015 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 Cal State East Bay Educational Foundation at the address below:

Cal State East Bay Educational Foundation
Cashier's Office, SA1200
25800 Carlos Bee Boulevard
Hayward, CA, 94542
Attn: Fern Tyler, Director of Advancement Services and Data Analytics

It is my intention that this gift complies with IRC 408(d)(8). It is also my intention to have this transfer qualify during the 2023 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2023.

In your transmittal to Cal State East Bay Educational Foundation, please include my name and address as the donor of record in connection with this transfer. Please designate my fund to _____. Also, copy me on your transmittal.

I understand I must at least be 70 ½ years of age to request a direct charitable distribution from my IRA.

If you have any questions or need to contact me, I can be reached at (telephone).

Thank you for your assistance in this matter.

Sincerely,

Plan Owner Name – Please Print
Address
City, State Zip

Cal State East Bay Educational Foundation's Federal Tax ID is 94-6128893