

Sample Letter of Intent Informing CVLS of a Forthcoming Qualified Charitable Distribution from IRA

Eric Donahue
CVLS (Chicago Volunteer Legal Services)
33 N Dearborn St, Ste 400
Chicago, IL 60602

Mr. Donahue,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to NAMI in the amount of \$_____ from my plan trustee/administrator, _____. It is my intention to comply with the requirements of the Internal Revenue Code, Section 408(d)(8), regarding qualified gifts from Individual Retirement Accounts (IRA) in connection with this gift.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by NAMI in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I receive an acknowledgement of this distribution, I understand that there is no federal charitable income tax deduction for this distribution.

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

Sincerely,

***We would be happy to answer any questions you may have about this material.
Please call us at 312-332-3513.***



CVLS • 33 N Dearborn St, Suite 400, Chicago, IL 60602
(312) 332-1624 • www.cvls.org