**Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to the Geological Society of America Foundation** \_\_\_, 20\_\_

Custody Agent

Address

**RE: Request for Charitable Distribution from Individual Retirement Account**

**#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in the name of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_\_\_\_\_\_\_\_\_ as provided by The Trade Facilitation and Trade Enforcement Act of 2015.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (not to exceed $100,000) payable to “Geological Society of America Foundation” and mail it directly to the following address:

Geological Society of America Foundation

P.O. Box 9140

3300 Penrose Place

Boulder, CO 80301

Attention: Clifton Cullen – IRA

In your transmittal to the Geological Society of America Foundation, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [i.e. Geological Society of America Foundation/affiliate and purpose].

Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 201\_ tax year.

If you have any questions, or need to contact me, I can be reached at: (\_\_\_) \_\_-\_\_\_\_\_\_.

Thank you for your assistance in this matter.

Sincerely,

Plan Owner Name

Plan Owners Address

For more information please contact Clifton Cullen at (303) 357-1007 or [ccullen@geosociety.org](mailto:ccullen@geosociety.org).

*Neither the Geological Society of America nor the Geological Society of America Foundation are engaged in rendering legal or tax advisory services. The above language is intended solely for general information purposes. For advice and assistance in specific cases, legal counsel should be obtained.*