Qualified Charitable Distribution (QCD) Request Letter

If you are age 70½ or older, you may be eligible to make a Qualified Charitable Distribution (QCD) directly from your IRA to the Barre Center for Buddhist Studies (BCBS).

To make a QCD, complete and sign the letter below and send it to your IRA custodian. Some custodians have their own forms or procedures, so we recommend checking with yours first.

Important year-end deadlines: To count toward the current tax year, your QCD must be completed by December 31. Because processing and mailing can take several weeks, we recommend submitting your request by December 1. If that date has passed, you probably still have time. Please check with your custodian about their year-end deadlines.

Please let us know when you have requested your QCD so we can watch for your gift and acknowledge your generosity. You can reach Melissa Gopnik, Executive Director, at melissag@buddhistinquiry.org or 978-355-2347.

IRA Custodian Name: _____

IRA Custodian Address: _____

Date: _____

RE: Qualified Charitable Distribution Request for 20_____

Dear IRA Custodian:

Please accept this letter as my request to make a Qualified Charitable Distribution from the IRA identified below pursuant to Section 408(d)(8) of the Internal Revenue Code.

IRA Account Number: _____

Distribution Amount: $ _____

Please make the distribution payable directly to:

Barre Center for Buddhist Studies, Inc.
149 Lockwood Rd.
Barre, MA 01005
EIN: 22-3058493

Please send the distribution directly to Barre Center for Buddhist Studies at the address above. If your procedures require that the check be sent to me for forwarding, please make the check payable to Barre Center for Buddhist Studies, Inc., not to me.

Important: The transmittal accompanying the distribution must include my full name and mailing address so that Barre Center for Buddhist Studies can identify me as the donor and properly acknowledge my gift. Please do not send the distribution without this identifying information.

Please send me a copy of the transmittal or other confirmation of the distribution.

It is my intention that this distribution qualify as a Qualified Charitable Distribution under Section 408(d)(8) of the Internal Revenue Code. If I am subject to a Required Minimum Distribution, I intend for this distribution to count toward my Required Minimum Distribution for the 20_____ calendar year.

Please process this request in sufficient time for the distribution to be made no later than December 31, 20_____.

If you have any questions or require additional information from me, I can be reached at:

Phone: _____

Email: _____

Thank you for your assistance and prompt attention to this matter.

Sincerely,

Signature: _____

Date: _____

Print Name: _____

Mailing Address: _____

City, State, ZIP: _____

Barre Center for Buddhist Studies provides this letter for your convenience and does not provide tax, legal, or financial advice. Please consult your IRA custodian or professional advisor regarding your eligibility and individual circumstances.