



How to Make a Qualified Charitable Contribution from Your IRA

Option 1:

Contact your IRA custodian and request a direct transfer to:

Phoenix Children's Hospital Foundation

2929 E. Camelback Road | Suite 122

Phoenix, AZ 85016

Our tax ID number is **74-2421549**

Do not withdraw the funds and make a contribution yourself, or you will have to report the withdrawal as taxable income.

If you are requesting the transfer at the end of the tax year, allow enough time for the transfer to complete by December 31.

Option 2:

Send a gift directly to Phoenix Children's Hospital Foundation using your IRA checkbook.

Allow extra time for the gift to clear in order to take a tax deduction in the current calendar year.

Contact the Leadership Team at **602-933-4483**, or **foundation@phoenixchildrens.com** with your name, the exact amount of your gift, and the name of your IRA custodian so we can provide you with substantiation for your tax return.

Please note that we are not in a position to give formal tax advice, and we strongly advise you to have these gifts reviewed by your own qualified financial or tax advisors.

Sample Letter

Request from You (IRA Plan Owner) to IRA Administrator for Charitable Distribution

[Date]

[IRA Administrator Name]

[IRA Administrator Address]

Re: Request for 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 # _____, as provided by the Protecting Americans from Tax Hikes Act of 2015.

Please issue a check in the amount of \$_____ [not to exceed \$100,000] payable to Phoenix Children's Hospital Foundation and mail it to:

2929 E. Camelback Road | Suite 122
Phoenix, AZ 85016

Phoenix Children's tax ID is #74-2421549

In your transmittal to Phoenix Children's Hospital Foundation, please include my name and address as the donor of record in connection with this distribution. Please copy me on your transmittal.

It is my intention to have this transfer qualify for the 20__ tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20__.

If you have any questions or need to contact me, I can be reached at _____ [provide your telephone number or email address].

Thank you for your assistance in this matter.

Sincerely,

Your Name

Your Address