



Date: _____

United Way of Pioneer Valley, Inc.
Attn: Resource Development/Planned Giving
1441 Main St., Suite 147
Springfield, Massachusetts 01103

Dear United Way Staff Representative:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) # _____ to the United Way of Pioneer Valley, Inc. in the amount of \$ _____ from my plan administrator/trustee, _____

as provided by the Tax Increase Prevention Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended. This notice will assure that UWPV will be anticipating my gift and will properly characterize it, upon receipt, as an IRA charitable rollover for 2016.

It is my intention that this IRA rollover gift comply with the “qualified charitable distribution” (QCD) requirements of Sec. 408(d)(8) of the Internal Revenue Code. Upon receipt of my gift from my IRA administrator/trustee, please send me a contemporaneous written acknowledgement that includes the amount of my gift, states that no goods or services were transferred to me in consideration for this gift, and indicated that UWPV has complied with all restrictions and requirements necessary to assure qualification of this gift as an IRA charitable rollover.

Please contact me with any questions.

Sincerely,

Donor’s Signature: _____ Date: _____

Printed Name: _____

Address: _____

City/Town: _____ State: _____ Zip Code: _____

Phone: _____ e-mail: _____