

**Sample Letter of Instruction for IRA gift  
to Texas Values**

[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 Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986, made permanent under the Consolidated Appropriations Act of 2016.

My account number is: [your account number]

Please issue a check in the amount of \$\_\_\_\_\_ [not to exceed \$100,000] payable to Texas Values and mail it to:

Texas Values  
1005 Congress Ave, Ste 830  
Austin, TX 78701

Texas Values' tax identification number is 46-1135306.

In your transmittal to Texas Values, please include my name and address as the donor of record for this distribution. Please also provide me with a copy of this transmittal. I intend to have this transfer qualify for the 20\_\_ tax year, so this distribution must be postmarked no later than December 31, 20\_\_.

If you have any questions, please contact me at \_\_\_\_\_ [your telephone number/email].

Thank you for your attention and assistance in this matter.

Sincerely,

\_\_\_\_\_

Your Name & Your Address