

Date: \_\_\_\_\_

To: \_\_\_\_\_  
Name of IRA Plan Administrator or Broker  
\_\_\_\_\_  
Firm  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
City/State/Zip

RE: \_\_\_\_\_  
Individual Retirement Account Number

Dear \_\_\_\_\_,

Effective \_\_\_\_\_(date), please distribute \$\_\_\_\_\_ (up to \$100,000 per individual each year) from the account referenced above directly to the Community Foundation of the Napa Valley (DBA, Napa Valley Community Foundation), a California nonprofit public benefit corporation located at 3299 Claremont Way, Suite 4, Napa, California, 94558, for benefit of the following

Fund(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

I intend for this transfer to be a qualified charitable distribution (QCD) from my IRA under the Protecting Americans from Tax Hikes (PATH) Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Napa Valley Community Foundation is qualified under section 170(b)(1)(A) of the Internal Revenue Code and therefore may receive qualified charitable distributions. This distribution will **not** be deposited into a donor advised fund or a supporting organization and no goods or services have been provided in exchange.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_ (phone number). Thank you for your assistance. Please contact Terence Mulligan at 707.254.9565 x 11 with questions about the Napa Valley Community Foundation, or for wire transfer instructions.

Sincerely,

\_\_\_\_\_  
(Your name here)

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_