

Sample Letter from Donor Informing Charity of Forthcoming Qualified Charitable Distribution from Administrator

Sonoma State University
ATTN: Erik Greeny
Vice President, University Development
Stevenson Hall 1054
1801 E. Cotati Avenue
Rohnert Park, CA 94928
(707) 664-2712

Dear Erik:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to your organization in the amount of \$ _____ from my plan trustee/administrator, (name of trustee/administrator).

It is my intent to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

The purpose of this gift is _____.

If you have any questions or need to contact me, I can be reached at (telephone).

Sincerely,

(Donor)

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account

RE: Request for Charitable Distribution from Individual Retirement Account

IRA Custodian

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # (Account Number) as provided by the Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$_____ payable to the organization at address below:

Sonoma State University
ATTN: University Development
Stevenson Hall 1054
1801 E. Cotati Avenue
Rohnert Park, CA 94928
(707) 664-2712

In your transmittal to the Sonoma State University, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

(Optional paragraph for requests occurring close to year-end) It is my intention to have this transfer qualify for exclusion during the (2008 or 2009) tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 201_.
If you have any questions or need to contact me, I can be reached at (telephone).

Thank you for your assistance in this matter.

Sincerely,

(Plan Owner)