

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to Harvard

_____, 2019

Custody Agent
Address

**RE: Request for Charitable Distribution from Individual Retirement Account # _____
in the name of _____**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____. It is my intention to have this transfer qualify for exclusion with respect to the 2019 tax year.

Please issue a check in the amount of \$_____ (not to exceed \$100,000) payable to “The President and Fellows of Harvard College” and mail it directly to the following address: University Planned Giving, Harvard University, 124 Mount Auburn Street, Cambridge, MA 02138-5795, Attn: Kara Morin.

In your transmittal to Harvard University, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of _____ [i.e. Harvard School/affiliate and purpose]. Please copy me on your transmittal.

If you have any questions, or need to contact me, I can be reached at: (____) ____-_____. Thank you for your assistance in this matter.

Sincerely,

Plan Owner Name

Plan Owners Address

_____, 201_
DONOR ADDRESS

Alumni and Development Services
Harvard University
124 Mount Auburn Street, Suite 430N
Cambridge, MA 02138

Dear Sir or Madam:

I have written to my IRA custody agent, _____ to request a distribution of
\$_____ directly to Harvard as a charitable gift, for the support of:

_____.

I would appreciate a written confirmation when you have received the funds. I understand
that I will not receive a federal income tax deduction for making this gift.

Thank you for your attention to this matter. If you have any questions, please contact me at
(phone number) _____ or donor_email_address@post.harvard.edu.

Sincerely,

DONOR