

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

____, 202_

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 # _____ as provided by The Trade Facilitation and Trade Enforcement Act of 2015.

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
Attention: Kara Morin – IRA

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.

It is my intention to have this transfer qualify for exclusion with respect to the 202_ tax year.

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