

Sample Letter to IRA Administrators

DATE

FINANCIAL INSTITUTION NAME (IRA ADMINISTRATOR)
ADDRESS
CITY, STATE, ZIP

Re: Request for qualified charitable distribution from *[insert donor's name]* individual retirement account

Dear Sir or Madam:

Please make a direct charitable distribution of \$_____ from my IRA account number _____ made payable to "Trustees of the College of the Holy Cross" (Tax ID: 04-2103558). This gift is made free of tax as provided in H.R. 2029: Division Q – Protecting Americans from Tax Hikes Act of 2015.

The check should be mailed to:

College of the Holy Cross
P.O. Box DEV
1 College Street
Worcester, MA 01610

It is my intention to have this transfer qualify for the 201____ tax year. Therefore, it is imperative this distribution be made no later than Dec. 31, 201____. Please list my name and address as the donor for the transfer, and please send me a copy of the correspondence with the College of the Holy Cross.

Please contact the College of the Holy Cross, Office of Gift Planning at 508-793-2481, if you need any additional information from the College. If you have any questions for me, I may be reached at the number below.

Sincerely,

NAME OF DONOR
ADDRESS
CITY, STATE, ZIP
TELEPHONE NUMBER