

**(Sample Letter from Donor to IRA Trustee/Administrator for qualified charitable distribution from an IRA)**

Date \_\_\_\_\_

TO: IRA Trustee/Administrator

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RE: Request for Direct Charitable Distribution from Individual Retirement Account (IRA)

Dear IRA Trustee/Administrator:

Please accept this letter as my request to make a direct qualified charitable distribution from my individual retirement account number as provided for by the Protecting Americans from Tax Hikes Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986 , as amended.

Please issue a check made payable to the **University of Minnesota Foundation** in the amount of \$\_\_\_\_\_ from my Individual Retirement Account # \_\_\_\_\_, and mail it to:

University of Minnesota Foundation  
Advancement Office  
600 East 4<sup>th</sup> Street  
Morris, MN 56267

The **University of Minnesota Foundation** is a 501 (c) (3) organization, with Tax ID number 41-6042488.

It is my intention that this gift complies with IRC 408(d)(8). It is also my intention to have this transfer qualify during the 2019 tax year. Therefore, it is imperative that this distribution be postmarked no later than Dec. 31, 2019.

Please include a copy of this letter with the check, and include my name on the check or with other accompanying correspondence, and send me a copy of the transfer for my records. Questions for the University of Minnesota Morris should be directed to Bill Robb at 320-589-6387 or [billrobb@morris.umn.edu](mailto:billrobb@morris.umn.edu).

You may contact me if you have any questions at \_\_\_\_\_ (phone).

Sincerely,

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
(printed name)