

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

RE: Request for Charitable Distribution from Individual Retirement Account

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. 205 of Division C of the Economic Stabilization Act of 2008 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$\_\_\_\_\_ payable to Smith College at the address below:

The Trustees of The Smith College  
Gift Accounting/Stoddard Annex  
Northampton, MA 01063  
Attn: Kerri Saucier  
Tax Id #: 04-1843040

In your transmittal to the charity, please note 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, 200\_\_\_\_.

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)

Contact Info