

**Letter from Donor to Plan Administrator Requesting  
Charitable Distribution from IRA to Harvard**

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
(Donor Name/Address)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
(Plan Administrator Name/Address)

**RE: Request for Charitable Distribution from IRA # \_\_\_\_\_ 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:

Harvard Business School  
P.O. Box 412275  
Boston, MA 02241-2275  
Attention: Kara Morin – IRA, University Planned Giving

In your transmittal to Harvard, 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 Harvard Business School. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 20\_\_\_\_ tax year.

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_ or \_\_\_\_\_.  
Thank you for your assistance in this matter. (phone) (email)

Sincerely,

\_\_\_\_\_  
(Donor Signature)