

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

Donor Name
Donor Address

Date

Plan Administrator Name
Plan Administrator 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:

University Planned Giving
Harvard University
124 Mount Auburn Street, 4th Floor
Cambridge, MA 02138-5795
Attention: Kara Morin – IRA

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 [phone] or [email]. Thank you for your assistance in this matter.

Sincerely,

Donor Name