Sample Letter of Instruction from Plan Owner to Charity Informing of Forthcoming Qualified Charitable Distribution from Plan Administrator

Date

Wellesley College
Development Office - Cheever House
106 Central Street
Wellesley, MA 02148

To whom it may concern:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to Wellesley College in the amount of $ _____ from my plan/trustee/administrator, _____. My gift is
Name of organization
available for unrestricted use or _____.

It is my intention to comply with the provisions of The Secure Act 2.0

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgment that states the date and amount of my gift, and that no goods or services were transferred to me by your organization in consideration for the gift.

If you have any questions or need to contact me, I can be reached at

_____, _____.
Phone Email

Sincerely,

_____ _____
Signature Print name