Sample Letter of Instruction from Plan Owner to Administrator for Qualified Charitable Distribution from Individual Retirement Account.

Date

Name of IRA Administrator
Address
City, State, Zip

Re: 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 # _____ as provided by the provisions of The Secure Act 2.0.

Please issue a check in the amount of $_____ to Wellesley College at the address below:

Wellesley College
Development Office - Cheever House
106 Central Street
Wellesley, MA 02148
Tax ID #: 04-2103637

In your transmittal to Wellesley College, please note my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. It is my intention to have this transfer qualify during this tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20____.

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

_____ _____
Phone Email

Thank you for your assistance in this matter.

Sincerely,

_____ _____
Signature Print name