

Sample Request from Plan Owner to IRA Administrator for 2018 Charitable Distribution

(Donor Name)
(Donor Address)

(Date), 2018

(Name of IRA Administrator)
(IRA Administrator Address)

RE: Request for Charitable Distribution from IRA

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ _____ payable to Midwestern State University and mail it to:

Rhonda McClung
Assistant Vice President of Gift Planning and Development
Midwestern State University
3410 Taft Blvd., Hardin 110
Wichita Falls, TX 76308

The tax identification number of Midwestern State University is 75-6001738.

In your transmittal to MSU, please include my name and address as the donor of record in connection with this distribution. Please copy me on your transmittal.

It is my intention that this distribution qualify for exclusion from my taxable income during the 2018 tax year. Therefore, it is imperative that this distribution be delivered to Midwestern State University no later than December 31, 2018.

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

Thank you for your assistance in this matter.

Sincerely,
