

Sample Letter from Donor Informing Charity of Forthcoming Qualified Charitable Distribution from Administrator

Sonoma State University Academic Foundation
ATTN: Patricia McNeill
Vice President, University Development
Stevenson Hall 1054
1801 E. Cotati Avenue
Rohnert Park, CA 94928
(707) 664-2712

Dear Patricia:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to your organization in the amount of \$ _____ from my plan trustee/administrator, (name of trustee/administrator).

It is my intent to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

The purpose of this gift is _____.

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

Sincerely,

(Donor)