

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account

**RE:** Request for Charitable Distribution from Individual Retirement Account

IRA Custodian

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # (Account Number) as provided by the Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$\_\_\_\_\_ payable to the organization at address below:

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

In your transmittal to the Sonoma State University Academic Foundation, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

(Optional paragraph for requests occurring close to year-end) It is my intention to have this transfer qualify for exclusion during the (2008 or 2009) tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 200\_.  
If you have any questions or need to contact me, I can be reached at (telephone).

Thank you for your assistance in this matter.

Sincerely,

(Plan Owner)