**Sample Request from IRA Plan Owner to Administrator for**

**Charitable Distribution to Harvard Chan School**

IRA Plan Owner Name

Plan Owner Address

Date

Custody Agent

Custody Agent Address

**Re: Request for Charitable Distribution from IRA #\_\_\_\_\_\_\_\_ in the name of \_\_\_\_\_\_\_\_\_\_\_\_\_**

Dear Administrator,

This is my request to make a direct charitable distribution from my Individual Retirement Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as provided by the Trade Facilitation and Trade Enforcement Act of 2015.

Please send a check for $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (not to exceed $100,000) payable to “The President and Fellows of Harvard College for Harvard Chan School of Public Health” and mail it directly to this address:

University Planned Giving, Harvard University

Attn: Kara Morin – IRA

124 Mt. Auburn Street

Cambridge MA 02138-5795

In the transmittal to Harvard University, please give my name and address as the donor of record in connection with this transfer, and please indicate that the check is for the benefit of the Harvard Chan School [purpose]. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion for the 20\_\_ tax year.

Please contact me at [phone] or [e-mail] if you have questions.

Thank you for your assistance.

Sincerely,

IRA Plan Owner Name

**Sample Letter from Donor Informing Harvard of IRA Gift**

Donor Name

Donor Address

Date

Denise Gorayeb, Director of Alumni and Development Services

Harvard University

124 Mount Auburn Street, Ste. 430N

Cambridge MA 02138

Dear Ms. Gorayeb,

I have written to my IRA custody agent, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, to request a distribution of $\_\_\_\_\_\_\_\_\_\_ to Harvard as a charitable gift, for the benefit of the Harvard Chan School [purpose].

Please send written confirmation when you have received the funds. I understand that I will not receive a federal income tax deduction for making this gift, but that I will not have to pay tax on the required minimum distribution.

Thank you for your attention to this matter. If you have any questions, please contact me at [phone number] or [e-mail].

Sincerely,

Donor Name