

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

Lorraine Wiedorn
Director, Planned Giving
Lehigh University
27 Memorial Drive West
Bethlehem, PA 18015

Dear Lorraine:

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

Please use my gift for the following purpose:_____

_____.

It is my intent to comply with the requirements of 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 written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by Lehigh in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

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

Sincerely,

(Donor)