

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

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

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

Please issue a check in the amount of \$_____ payable to Lehigh University at address below:

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

In your transmittal to the Lehigh University, please list 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 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2008.

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)