

SAMPLE LETTER OF INSTRUCTION TO IRA ADMINISTRATOR

Date

IRA Administrator
ADDRESS
CITY, STATE

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct qualified charitable distribution from my IRA with account number _____. This transfer is permitted by Section 208 of the American Taxpayer Relief Act of 2012, first authorized by Section 1201 of the Pension Protection Act of 2006 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

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

Office of Development
Olivet Nazarene University
One University Ave.
Bourbonnais, IL 60914

Olivet Nazarene University is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, and therefore qualifies for the direct charitable distribution from Individual Retirement Accounts. Olivet's Federal Tax ID Number is 36-2191252 and their telephone number is 1-815-928-5598.

Since I plan to have this transfer qualify as a charitable rollover for the _____ tax year, it is imperative this distribution is postmarked no later than December 31, 20____. In your transmittal to the charity, my name and address needs to be included as the donor of record in connection with this gift. Please provide me with confirmation of this transfer.

If you have any questions or need to contact me, I can be reached at (telephone number). Thank you for your assistance in this matter

Sincerely,

(Plan Owner)

cc: Olivet Nazarene University