

Sample Letter to IRA Administrators

Date

Financial Institution Name

Address

City, State, Zip

Re: Request for charitable distribution from IRA

Dear IRA Administrator:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ as provided in The Protecting Americans from Tax Hikes Act of 2015 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ _____ payable to Saint Michael's College and mail it to:

Saint Michael's College
One Winooski Park, Box 256
Colchester VT 05439
Attn: Carla Francis

Saint Michael's College's tax identification number is 03-0179403.

In your transmittal, please include my name and address as the donor of record in connection with this distribution and indicate that this distribution should be used to support _____ [or indicate Highest Priorities]. Please copy me on your transmittal at the address below.

It is my intention that this distribution qualify for exclusion from my taxable income during the ____ tax year. Therefore, it is imperative that this distribution be delivered to Saint Michael's College no later than December 31, _____.

Please contact Carla Francis at Saint Michael's College if you need any additional information. She can be reached at 802.654.2618 or email cfrancis@smcvt.edu

Thank you for your prompt assistance.

Sincerely,

Name of Donor

Address

City, State, Zip

Phone &/or Email