



Sample Letter of Instruction from Donor to Individual Retirement Account (IRA) Provider

Date: _____

Name of IRA Provider: _____

Address: _____

Re: Request for Qualified Charitable Distribution from IRA

Dear IRA Administrator:

Please accept this letter as my request to make a Qualified Charitable Distribution (a “charitable IRA rollover”) to Earlham College under Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986. It is my intent that this charitable IRA rollover be a qualified charitable distribution for tax year: _____. Therefore, it is imperative that this distribution be received by the College before December 31 of that year.

Please issue a check from my Individual Retirement Account as follows:

Account Number: _____

Distribution Amount: \$ _____

Issue and Mail To: **Earlham College Institutional Advancement**
801 National Road West
Richmond, IN 47374

In your transmittal to Earlham College, please include my name and address as the donor of record in connection with this distribution, and copy me on your transmittal.

The purpose of this gift is for: _____

If you have any questions or concerns regarding this request, I may be reached at:

Phone number: _____ Email address: _____

Thank you for your prompt attention to and assistance with this matter.

Sincerely,

Donor’s Signature: _____ Date: _____

Printed Name: _____

Address: _____



Letter of Instruction from Donor to Earlham College

Date: _____

Earlham College Institutional Advancement

801 National Road West
Richmond, IN 47374

This is to inform you that I have requested a qualified charitable distribution to Earlham College from my Individual Retirement Account as described below:

IRA Provider Name: _____

Distribution Amount: \$ _____

The purpose of this gift is to support: _____

If you have any questions or concerns regarding this request, I may be reached at:

Phone number: _____ Email address: _____

Address: _____

Sincerely,

Donor's Name: _____

Date: _____