

Sample Letter from Donor to Plan Provider

Name of Plan Provider
Address
City, State Zip

Re: Request for Direct Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable contribution from my Individual Retirement Account Number (insert account number) as provided by the *Protecting Americans from Tax Hikes Act of 2015*. Please issue a check in the amount of \$_____ payable to The Trustees of the University of Pennsylvania at the following address:

University of Pennsylvania
Office of Gift Planning
2929 Walnut Street
Suite 300
Philadelphia, PA 19104-5099

In your transmittal to The Wharton School, please memorialize my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the 2017 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2017.

If you have any questions or concerns regarding this request, I can be reached at (telephone or e-mail address). Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

Name of Donor