

Sample Letter from Donor to Plan Provider

[Name of Plan Provider
Address
City, State Zip]

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a charitable contribution by way of a Qualified Charitable Distribution 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 the Treasurer
P.O. Box 71332
Philadelphia, PA 19176-9913

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 that this transaction meet the requirements of a Qualified Charitable Distribution during the 2024 tax year. Therefore, it is imperative that this distribution be completed no later than December 31, 2024.

If you have any questions or concerns regarding this request, I can be reached at [insert telephone or e-mail address]. Thank you for your prompt attention to this matter.

Sincerely yours,

[Name of Donor]