

(Sample Letter to IRA Trustee/Administrator to request charitable distribution from IRA)

TO: IRA Trustee/Administrator

RE: Request for Qualified Charitable Distribution from Individual Retirement Account (IRA)

Dear IRA Trustee/Administrator:

I am writing to request a qualified charitable distribution from my Individual Retirement Account # _____.

Please send a check made payable to the **University of Minnesota Foundation** (a 501(c)(3) organization, Tax ID #41-6042488) in the amount of \$_____ and mail it to:

University of Minnesota Foundation
Attn: IRA Gift Processing
200 Oak Street SE, Suite 500
Minneapolis, MN 55455

It is my intention for this gift to be a qualified charitable distribution for the current calendar year. For that reason, the distribution must be made no later than Dec. 31, 20__.

Please include my name on the check or the accompanying correspondence, and send me a copy of the transfer for my records.

I would like to designate this gift for:

(Name of campus, college, program or fund)

If you have any questions, I can be reached at _____

Date _____ Signature _____
Name _____
Address _____
City/State/Zip _____

cc: University of Minnesota Foundation
Attn: IRA Gift Processing
200 Oak Street SE, Suite 500
Minneapolis, MN 55455
(612) 624-3333 or giving@umn.edu