

**SAMPLE LETTER OF INSTRUCTION TO IRA ADMINISTRATOR**

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dear Sir or Madam:

Re: Request for Charitable Distribution from Individual Retirement Account

Please accept this letter as my request to make a **direct charitable distribution** from my Individual Retirement Account # \_\_\_\_\_ as provided. I intend this to be a qualified charitable distribution under the *Protecting Americans from Tax Hikes Act of 2015*, signed into law by President Obama on December 18, 2015 (extending the provisions under Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended).

Please issue a check in the amount of \$ \_\_\_\_\_. Make the check payable to the **University of Idaho Foundation, Inc.**, and mail it to the following address:

University of Idaho Foundation, Inc.  
Attn: Shawna Lindquist  
875 Perimeter Drive – Mail Stop 3147  
1210 Blake Ave - Mary E. Forney Hall Bldg  
Moscow, ID 83844-3147

The Tax Identification Number of the University of Idaho Foundation is 23-7098404.

In your transmittal letter, please memorialize my name and address as the donor of record in connection with this transfer, and indicate that this gift is to be credited to \_\_\_\_\_.

Please copy me on your transmittal.

If you have any questions, please contact me at the address/telephone number indicated below.

Sincerely,

**SAMPLE LETTER OF INSTRUCTION TO UNIVERSITY OF IDAHO FOUNDATION**

Date: \_\_\_\_\_

University of Idaho Foundation, Inc. Attn:  
Shawna Lindquist  
875 Perimeter Drive – MS 3147  
1210 Blake Ave - Mary E. Forney Hall Bldg  
Moscow, ID 83844-3147

Dear Shawna:

It is my pleasure to inform you that I have requested a qualified charitable distribution payable to your organization in the amount of \$ \_\_\_\_\_ from \_\_\_\_\_, the trustee/administrator of my Individual Retirement Account. A copy of my letter of request to the trustee/administrator is enclosed.

I intend for my gift to be an IRA Charitable Rollover under the *Protecting Americans from Tax Hikes Act of 2015*, signed into law by President Obama on December 18, 2015 (extending the provisions under Sec. 1201 of the Pension Protection Act of 2006 and Sec.408(d)(8) of the Internal Revenue Code of 1986, as amended). Accordingly, upon your receipt of the payment, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. It is my desire that this gift be credited to \_\_\_\_\_.

If you have any questions, please contact me at the address/telephone number indicated below.

Sincerely,