

Sample Letter of Instructions from Donor to Plan Provider for 2012 Gifts

Date

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 charitable contribution from my Individual Retirement Account Number:

[insert account number]

as provided by the American Taxpayer Relief Act of 2012 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ _____ payable to Cardinal Stritch University at the following address:

Cardinal Stritch University
6801 N Yates Rd #99
Milwaukee WI 53217

In your transmittal to the charity, please state 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 2012 tax year. Therefore, it is imperative that this distribution be postmarked no later than January 31, 2013.

If you have any questions or concerns regarding this request, I can be reached at [PHONE AND EMAIL ADDRESSES].

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

Sincerely yours,

[DONOR NAME]