

Sample Letter from Donor to IRA Financial Institution for 2013 Charitable Distribution

[DATE]

[NAME OF IRA Financial Institution]

[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 and authorization to process a qualified charitable contribution from my Individual Retirement Account Number, [insert account number], as provided by 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 \$ [redacted] payable to the “**University of Arkansas Foundation, Inc. for the benefit of UAMS**” and send directly to the address shown below:

University of Arkansas for Medical Sciences
Institutional Advancement
4301 West Markham Street, #716
Little Rock, AR 72205-7199

The Taxpayer Identification Number for the University of Arkansas Foundation, Inc. is 71-6056774.

In your transmittal to UAMS, please copy me and include the following: (1) my name and address as the donor of record in connection with this transfer, and (2) reflect that I intend for the transfer to benefit following area of UAMS: [redacted] or UAMS Greatest Needs. I intend for this transfer to qualify for exclusion from my taxable income for the 2013 tax year. Therefore, it is imperative that this distribution be postmarked or processed no later than December 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]

The University of Arkansas Foundation, Inc. (“Foundation”) is a 501(c)(3) organization. The Foundation manages and invests philanthropic funds for the benefit of the University of Arkansas for Medical Sciences (UAMS).