

SAMPLE LETTER FROM IRA DONOR INFORMING THE SISTERS OF THE HOLY CROSS
OF A FORTHCOMING QUALIFIED CHARITABLE DISTRIBUTION FROM AN IRA:

(Date)

Sister M. Rose Edward (Goodrow), CSC
Sisters of the Holy Cross
Development Office
407 Bertrand Hall–Saint Mary's
Notre Dame, IN 46556-5000

Dear Sister Rose Edward:

I am writing to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to your organization in the amount of \$_____ from my plan trustee/administrator, (insert name of trustee/administrator).

It is my intent to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

Accordingly, upon your receipt of payment from my trustee/administrator, 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.

If you have any questions or need to contact me, I can be reached at (telephone).

Sincerely,

(Donor)