

**Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to Harvard**

\_\_\_\_, 202\_

Custody Agent  
Address

**RE: Request for Charitable Distribution from Individual Retirement Account # \_\_\_\_\_  
in the name of \_\_\_\_\_**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ as provided by The Trade Facilitation and Trade Enforcement Act of 2015.

Please issue a check in the amount of \$ \_\_\_\_\_ (not to exceed \$100,000) payable to “The President and Fellows of Harvard College” and mail it directly to the following address:

University Planned Giving  
Harvard University  
124 Mount Auburn Street  
Cambridge, MA 02138-5795  
Attention: Kara Morin – IRA

In your transmittal to Harvard University, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of \_\_\_\_\_ [i.e. Harvard School/affiliate and purpose]. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 201\_ tax year.

If you have any questions, or need to contact me, I can be reached at: (\_\_\_\_) \_\_\_\_-\_\_\_\_\_.

Thank you for your assistance in this matter.

Sincerely,

Plan Owner Name

Plan Owners Address