

Sample request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to Harvard GSD.

____, 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 **Harvard Graduate School of Design**. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 202_ 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,

Sample letter from donor informing Harvard University of pending IRA QCD transfer.

_____, 202_
DONOR ADDRESS

Denise Gorayeb, Recording Secretary

Recording Secretary's Office Harvard
University
124 Mount Auburn Street, Suite 430N
Cambridge, MA 02138

Dear Ms. Gorayeb:

I have written to my IRA custody agent, _____ to request a distribution of
\$_____ directly to Harvard as a charitable gift, for the support of the Harvard Graduate
School of Design.

I would appreciate a written confirmation when you have received the funds. I understand that I
will not receive a federal income tax deduction for making this gift.

Thank you for your attention to this matter. If you have any questions, please contact me at
(phone number)_____ or (donor e-mail address) _____.
Sincerely,

DONOR