

DATE _____
PLAN PROVIDER _____
ADDRESS _____
CITY, STATE, ZIP _____

Re: Request for Direct Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my formal request to make a direct qualified charitable contribution (a “charitable IRA rollover”) from my Individual Retirement Account:

Account Number: _____

as provided by Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, and under the provisions of the Protecting Americans from Tax Hikes Act of 2015 (the “PATH” Act, extending section 1201 of Public Law 109-280)

Please issue a check in the amount of \$_____ payable to UNIVERSITY OF PUGET SOUND (tax ID: **91-0564961**) at the following address:

University of Puget Sound
Attn: Capital and Planned Giving
1500 N. Warner Street CMB 1087
Tacoma, WA 98416-1087

In your transmittal to Puget Sound, please include 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 2019 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2019.

I further represent as follows:

1. I am over 70½ years of age. My date of birth is: _____.
2. I will not receive any benefits from the University of Puget Sound as a result of this rollover. This rollover is not directed to a charitable remainder trust, lead trust, gift annuity, pooled income fund, donor advised fund, supporting organization, family foundation, or other non-qualified use of a charitable IRA rollover.
3. I will not incur any federal income tax liability as a result of this rollover, therefore I elect out of withholding for this rollover. I will not accept any personal distribution of funds intended for this charitable IRA rollover.

If you have any questions or concerns regarding this request, please contact Kurt Graupensperger, Director of Capital Giving at University of Puget Sound at 253.879.8541 or kgraupensperger@pugetsound.edu.

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

Sincerely yours,

Donor’s name

Date