

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account

**RE:** Request for Charitable Distribution from Individual Retirement Account

IRA Custodian

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # (Account Number) as provided by Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$\_\_\_\_\_ payable to the organization at address below:

University of Florida Foundation, Inc.  
2012 W. University Avenue  
Gainesville, FL 32603  
ATTN: John E. Knight III, Legal Counsel  
(352) 392-5515

In your transmittal to the University of Florida Foundation, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

(Optional paragraph for requests occurring close to year-end) It is my intention to have this transfer qualify for exclusion during the (2008 or 2009) tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 200\_.  
If you have any questions or need to contact me, I can be reached at (telephone).

Thank you for your assistance in this matter.

Sincerely,

(Plan Owner)