

SAMPLE LETTER FOR IRA TRANSFER TO MIDDLEBURY COLLEGE
Request from Plan Owner of traditional IRA or Roth IRA to Plan Administrator

[Date]

TO: [Your IRA plan administrator]

RE: Request for Charitable Distribution from Individual Retirement Account

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 Sec. 1201 of the Pension Protection Act of 2006 (as extended by the Emergency Economic Stabilization Act) and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

OPTIONAL: Please sell _____ fund/ _____ securities to generate the cash for this qualified distribution.

Please issue a check in the amount of \$ _____ (not to exceed \$100,000) payable to The President and Fellows of Middlebury College at the address below:

The President and Fellows of Middlebury College
c/o Brenda Currier, Manager of Gift Administration
Middlebury College, Office of College Advancement
5 Court Street 115
Middlebury, VT 05753

In the event you have any questions for Ms. Currier, she can be reached at (802) 443-5922, or by email at currier@middlebury.edu.

In your transmittal to Middlebury College, please give my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. In the event it is easier for you, I have provided a copy of a sample transmittal letter.

It is my intention to have this transfer qualify for exclusion during the 2008 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2008. If you have any questions or need to contact me, I can be reached at [telephone number]. Thank you for your assistance in this matter.

Sincerely,

Plan Owner
Plan Owner Address