

Sample Letter from Donor Informing Middlebury College of Forthcoming Qualified Charitable Distribution from IRA Administrator

[Date]

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

Dear Ms. Currier:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to The President and Fellows of Middlebury College in the amount of \$_____ from my plan trustee/administrator, _____[name of trustee/administrator].

Please credit the distribution amount to Middlebury College Annual Fund [optional, or for the following purpose:_____].

It is my intent to comply with the requirements of 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, in connection with this gift. Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift to Middlebury College is not a gift to a donor advised fund or to a supporting organization described in section 509(a)(3) of the Code.

If you have any questions or need to contact me, I can be reached at [telephone number].

Sincerely,

[Donor Name and Class Year]

[Donor Address]