## Sample Letter for IRA Donation

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Broker Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Broker Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

**Please accept this letter as my request to make a direct Qualified Charitable Distribution (QCD) from my Individual Retirement Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as provided by Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended. This type of contribution was originally enacted by the Pension Protection Act of 2006 and was made permanent in the Protecting Americans from Tax Hikes (PATH) Act of 2015. The University of California, Berkeley Foundation is a nonprofit corporation that is qualified to receive direct tax-free QCDs from IRA assets as described in IRC Sec. 408(d)(8). The Taxpayer Identification Number of the University of California, Berkeley Foundation is #94-6090626.**

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ payable to **University of California, Berkeley Foundation** and send to the address below:

University of California, Berkeley Foundation  
Donor and Gift Services  
1995 University Ave Ste 400

Berkeley, CA  94704-1070

Attn: Brenda Carrasco

**In your transmittal to the University of California, Berkeley Foundation, please memorialize my name and address as the donor of record in connection with this transfer. If possible, please also indicate that I want the gift to support** **FUND NAME(S) (Fund Number(s): #)** **Please copy me on your transmittal.**

It is my intention to have this distribution qualify for income tax exclusion. **Therefore, it is imperative this distribution be postmarked no later than December 31, 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,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[Name of Plan Owner]

cc: University of California, Berkeley Foundation  
 Office of Gift Planning  
 1995 University Ave Ste 401

Berkeley, CA 94704-1058

Attn: