

# Sample Letter for IRA Donation

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

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

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

\_\_\_\_\_

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

Please accept this letter as my request to make a direct charitable distribution 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 (This type of contribution was originally enacted by the Pension Protection Act of 2006 and was made permanent in the *Protecting Americans from Tax Hikes (PATH) Act* of 2015.)

Please note that the University of California, Berkeley Foundation is a nonprofit corporation that is qualified to receive direct tax-free rollover charitable contributions 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  
Office of Gift Planning  
2080 Addison Street, MC #4200  
Berkeley, CA 94720-4200  
Attn: Melanie Keilholtz, CSPG

**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 Osher Lifelong Learning Institute Annual Fund. 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, 2020**

If you have any questions or need to contact me, I can be reached at \_\_\_\_\_.  
Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_

Plan Owner

cc: University of California, Berkeley Foundation  
Office of Gift Planning  
2080 Addison Street, MC #4200  
Berkeley, CA 94720-4200  
Attn: Melanie Keilholtz, CSPG