

**Sample Letter of Instruction from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account**

\_\_\_\_\_  
(date)

\_\_\_\_\_  
(Name of IRA Administrator)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State, Zip)

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 provisions of The Secure Act 2.0.

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

The Trustees of The Smith College  
Gift Accounting/Alumnae House  
Northampton, MA 01063  
Attn: Advancement Services Director  
Tax ID #: 04-1843040

In your transmittal to the charity, please note my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. It is my intention to have this transfer qualify during the tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20 \_\_\_\_ .

If you have any questions or need to contact me, I can be reached at

\_\_\_\_\_, \_\_\_\_\_.  
(phone) (email)

Thank you for your assistance in this matter.

Sincerely,

---

(signature)

---

(print name)