

**Sample Letter of Instruction from Plan Owner to Charity Informing of
Forthcoming Qualified Charitable Distribution from Plan Administrator**

Attn: Advancement Services Director
Smith College Development
33 Elm Street
Northampton, MA 01063

To whom it may concern:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to your organization in the amount of \$_____ from my plan trustee/administrator, _____. My gift is to be designated
(name of trustee/administrator)
through the Smith Fund or _____.
(other purpose of your choice)

It is my intent to comply with the provisions of The Protecting Americans from Tax Hikes (PATH) Act of 2015.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the date and 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 will not be placed in a donor advised fund or supporting organization.

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

_____, _____.
(phone) (email)

Sincerely,

(signature)

(print name)