

SAMPLE REQUEST LETTER FROM DONOR TO IRA ADMINISTRATOR FOR A QUALIFIED CHARITABLE DISTRIBUTION TO COLORADO COLLEGE

Date

Name of IRA Trustee/Administrator

Address

City, State Zip Code

Re: Qualified Charitable IRA Distribution to Colorado College

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution (a “charitable IRA rollover”) in the amount of \$ _____ [any amount up to \$100,000] from my Individual Retirement Account # _____ [account number] as provided by Sec. 408(d)(8) of the Internal Revenue Code.

Distribution should be made payable to:

Colorado College

Office of Gift Planning

14 E. Cache La Poudre St.

Colorado Springs, CO 80903

Colorado College’s tax ID is: 84-0402510

My contact at Colorado College is Ty Nagamatsu, Estate Settlement & Gift Planning Officer, who can be reached at (719) 389-6828 or by email at tnagamatsu@coloradocollege.edu.

In your transmittal to Colorado College, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have any questions or need to contact me, I can be reached at _____ [your telephone number].

Thank you for your assistance in this matter.

Sincerely,

[IRA Plan Owner/Donor]

SAMPLE LETTER FROM DONOR INFORMING COLORADO COLLEGE OF FORTHCOMING QUALIFIED CHARITABLE DISTRIBUTION FROM IRA

Date

Ty Nagamatsu, Estate Settlement & Gift Planning Officer
Colorado College
Office of Gift Planning
14 E. Cache La Poudre St.
Colorado Springs, CO 80903

Re: Qualified Charitable IRA Distribution to Colorado College

Dear Ty,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to Colorado College in the amount of \$ _____ [any amount up to \$100,000] from my plan trustee/administrator, _____ [name and contact number for IRA trustee/administrator].

Please use my gift to Colorado College for the following purpose: _____ [gift designation, if any].

It is my intention that this IRA rollover gift comply with the "qualified charitable distribution" requirements of Sec. 408(d)(8) of the Internal Revenue Code. Accordingly, upon your receipt of payment from my IRA trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were provided to me by Colorado College in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization. Even though I will receive an acknowledgement of this distribution, I understand that there is no federal charitable income tax deduction for this distribution.

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

Sincerely,
[IRA Plan Owner/Donor]

We would be happy to answer any questions you may have about this information. Please call Ty Nagamatsu, Estate Settlement & Gift Planning Officer, at (719) 389-6828.