

DRAFT Sample Letters for Qualified IRA Gifts to Princeton

1. Sample Request from IRA Account Owner (Donor) to IRA Administrator 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 # [Account Number] as provided by the American Taxpayer Relief Act of 2012 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please send me the appropriate forms to issue a check from my IRA account in the amount of \$_____ payable to The Trustees of Princeton University and send the check to the address below:

Trustees of Princeton University
Attn: Helen Hardy
Alumni and Donor Records
P. O. Box 5357
Princeton, NJ 08543-5357

Princeton's tax ID number is: 21-0634501.

In your transmittal to the Trustees of Princeton University, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

[Optional paragraph for donors making a transfer before January 31, 2013, and choosing to have the transfer qualify for exclusion during the 2012 tax year] It is my intention to have this transfer qualify for exclusion during the 2012 tax year. Therefore, it is imperative this distribution be postmarked no later than January 31, 2013.

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

Thank you for your assistance in this matter.

Sincerely,

[IRA Account Owner]

2. Sample Letter from Donor Informing Princeton of Forthcoming Qualified Charitable Distribution from IRA Administrator

Princeton University
Attn: Helen Hardy
Alumni and Donor Records
P. O. Box 5357
Princeton, NJ 08543-5357

Dear Helen:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to The Trustees of Princeton University in the amount of \$_____ from my plan trustee/administrator, [name and contact number for IRA Administrator]. This gift is to be allocated towards [the Class of 19__ Annual Giving Campaign/capital purpose].

It is my intent to comply with the requirements of the American taxpayer Relief Act of 2012 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

Accordingly, upon your receipt of payment from my 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 Princeton University 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 [telephone].

Sincerely,

[Donor name]