

**[Sample Request from Plan Owner to Administrator for
Charitable Distribution from Individual Retirement Account]**

**Plan Owner Name
Address
City, State Zip Code**

Date

IRA Administrator/Contact
Company/Institution
Address
City, State Zip Code

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 # _____ and issue a check in the amount of \$ _____ payable to Worcester Polytechnic Institute at the following address:

Worcester Polytechnic Institute
Office of Development & Alumni Relations
100 Institute Road
Worcester, MA 01609

In your transmittal to Worcester Polytechnic Institute, please reference my name and address as the donor of record in connection with this transfer. Please also copy me on your transmittal.

If you have any questions or need to contact me, I may be reached at <telephone number>.

Thank you for your assistance with this matter,

Sincerely,

<Signature of Plan Owner>

cc: WPI

**[Sample Letter from Donor Informing WPI of
Forthcoming Qualified Charitable Distribution from Plan Administrator]**

**Donor Name
Address
City, State Zip Code**

Date

Worcester Polytechnic Institute
Office of Development & Alumni Relations
100 Institute Road
Worcester, MA 01609

Dear Sir or Madam:

It is my pleasure to inform you that I have requested from my plan trustee/administrator, <name of trustee/administrator>, of <Company/Institution> that a qualified charitable distribution from my Individual Retirement Account be paid to WPI in the amount of \$_____.

It is my intent to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

I would like to designate this gift for:

- Annual Fund
- Other: <state a specific purpose or designation> (ex., Class of 1959 Anniversary Gift Fund)

If you have any questions or need to contact me, I may be reached at <telephone number>.

Sincerely,

<Donor's Signature>