

Sample Letter to IRA Administrator

Your Name
Your Street Address
City, State Zip
Date

Name of Company
Address
City, State, Zip

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please make a direct charitable distribution from my IRA # _____ to Clarkson University as provided by the Pension Protection Act of 2006 and permanently extended under the Protecting Americans From Tax Hikes Act of 2015. Clarkson University's tax identification number is 15-0543659. Please issue a check in the amount of \$ _____ payable to Clarkson University and mail to the address below:

Clarkson University
Annie Clarkson Society
8 Clarkson Avenue
Box 5522, Woodstock Lodge
Potsdam, NY 13699

Further:

1. I am over 70½ years of age. My date of birth is: _____.
2. I will not receive any benefits from Clarkson University as a result of this rollover.
3. This rollover is not directed to a charitable remainder trust, gift annuity, pooled income fund or other prohibited use.
4. I will not incur any federal income tax liability as a result of this distribution therefore I elect out of withholding for this rollover. I will not accept any personal distribution of funds intended for this charitable IRA rollover.
5. I understand that this charitable IRA rollover may count toward my required IRA distribution(s) for the year of the gift.

In your transmittal letter to Clarkson, please include my name and address as the donor of record. Please copy me on your transmittal.

Please contact Steven Smalling at 315-244-7945 or Carol Parker at 315-268-7778 if you need additional information from Clarkson University. You may contact me at this telephone number: _____. Thank you for your assistance in this matter.

Sincerely,

Your Name