**Sample Letter of Instruction from Donor to IRA Provider**

[DATE]

[NAME OF IRA PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

*(Call your plan provider to determine the most efficient way to send this letter of instruction)*

**Re: Request for Qualified Charitable Distribution from Individual Retirement Account**

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable contribution from my Individual Retirement Account Number: **[insert IRA account number]** as provided by the Protecting Americans from Tax Hikes Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_ payable to (check entity below that applies):

Federal tax identification number

\_\_\_\_\_\_ William & Mary, an agency of the Commonwealth of VA 54-6001718

\_\_\_\_\_\_ William & Mary Foundation (WMF) 54-0734117

\_\_\_\_\_\_ Marshall-Wythe School of Law Foundation 54-1224563

\_\_\_\_\_\_ William & Mary Alumni Association 54-6054289

\_\_\_\_\_\_ William & Mary Athletic Educational Foundation 54-6056480

\_\_\_\_\_\_ William & Mary Business School Foundation 23-7079011

\_\_\_\_\_\_ Virginia Institute of Marine Science Foundation 54-2027915

\_\_\_\_\_\_ The Muscarelle Museum of Art Foundation 46-1110899

Please send check to the following address:

William & Mary

Attn: IRA Processing

Gift Accounting Office

P.O. Box 1693

Williamsburg, VA 23187

In your transmittal to William & Mary, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the 2019 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2019.

If you have any questions or concerns regarding this request, I can be reached at [PHONE AND EMAIL ADDRESSES]. Thank you for your prompt assistance with this matter.

Sincerely,

[DONOR SIGNATURE]