

Sample Letter from Donor Informing Charity of Forthcoming Qualified
Charitable Distribution from Administrator

[Date]

InterVarsity Christian Fellowship
P.O. Box 7895
6400 Schroeder Road
Madison, WI 53707-7895

Attention: Gift Planning Office

Dear Friends,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to InterVarsity Christian Fellowship in the amount of \$_____ from my plan trustee/administrator, [name of trustee/administrator]. This gift is to be used for the general purposes of InterVarsity Christian Fellowship [please substitute other language if you want your donation to be applied to a specific staff member or project].

It is my intent to comply with the requirements of Section 1201 of the Pension Protection Act of 2006 and Section 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 InterVarsity as 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)
(Donor Address)

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

[Date]

TO: [Plan Administrator]
[Plan Address]

RE: Request for Charitable Distribution from Individual Retirement Account
Account # _____

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ as provided by Section 1201 of the Pension Protection Act of 2006 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$_____ (not to exceed \$100,000) payable to the organization at the address below:

Attn: Gift Planning Office
InterVarsity Christian Fellowship
P.O. Box 7895
Madison, WI 53707-7895

In your transmittal to InterVarsity Christian Fellowship, please give my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

Optional paragraph for requests occurring close to year-end: It is my intention to have this transfer qualify for exclusion from taxable income during the [2006 or 2007] tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 200_.

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,

[Plan Owner]
[Plan Owner Address]