

Date

Name of IRA Custodian

Address

City, State ZIP

RE: Request to Initiate Qualified Charitable Distribution from IRA

Dear IRA Custodian:

Federal law permits the account holder of an IRA or Roth IRA who is age 70 ½ or older to make a Qualified Charitable Distribution (“QCD”) directly from their IRA/Roth IRA to a qualified public charity.

As the owner of IRA Account # _____ that is in the custody of your organization, I request that you issue a check in the amount of \$ _____ payable to the “University of Georgia Foundation” and mail it to:

The University of Georgia Foundation
394 S. Milledge Ave, Suite 100
Athens, GA 30602-5582

The University of Georgia Foundation’s tax identification number is 58-6033837. It is my intention that the above-listed gift be treated as a QCD and that the same be used to satisfy, in whole or part, my Required Minimum Distribution (RMD) in the year of the transfer.

In your transmittal to the University of Georgia Foundation, please include my name and address as the donor of record in connection with this transfer, and copy me on the transmittal at the address below. It is also my intention to have this transfer qualify during the 2017 tax year. Therefore, it is imperative that this distribution be postmarked no later than Dec. 31, 2017.

If you have any questions or concerns regarding this request, I can be reached at [insert your telephone number and/or email address]. Thank you for your prompt attention to and assistance in this matter.

Sincerely,

Name of donor

Donor’s address

City, State ZIP

Donor’s phone number