

Sample Letters for Qualified IRA Rollover Gifts

1. Sample - Request from IRA Account Owner (Donor) to Donor IRA Administrator for Charitable Distribution from Donor Individual Retirement Account to Texas A&M International University.

_____: [insert date of letter]

[insert donor IRA Administrator contact name and address]

Dear _____: [complete salutation]

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

Please send me the appropriate forms to issue a check from my IRA account in the amount of \$ _____ [insert amount of QCD] payable to, the Texas A&M International University, and forward the check directly to the address below:

Office for Institutional Advancement
Attn: Candy Hein, Vice President for Institutional Advancement
Texas A&M International University
5201 University Boulevard
Laredo, TX 78041

In your transmittal to the Texas A&M International University, please recognize my name and address as the donor of record in connection with this transfer. Please also copy me on your transmittal communication.

It is my intention, to have this transfer qualify for income tax exclusion during the 2007 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 29, 2007.

If you have any questions or need to contact me, I may be reached at _____ [insert donor telephone #]

Thank you for your assistance in this matter.

Sincerely,
[IRA Donor Account Owner]

[NOTE: Please include with this letter, the Texas A&M International University IRS Determination Letter]

2. Sample Letter from Donor Informing Texas A&M International University of a Forthcoming Qualified Charitable Distribution from Donor IRA Administrator

_____: [insert date of letter]

Office for Institutional Advancement
Attn: Candy Hein, Vice President for Institutional Advancement
Texas A&M International University
5201 University Boulevard
Laredo, TX 78041

Dear Candy:

It is my pleasure to inform you that I have requested from my plan trustee/administrator,

[insert donor IRA Administrator contact name and telephone #], a qualified charitable distribution from my Individual Retirement Account. This charitable distribution is to be directly payable to Texas A&M International University in the amount of \$ _____ [insert amount of QCD].

This gift is to be used for Texas A&M International University's general charitable purpose.

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.

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were provided to me by Texas A&M International University in 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 may be reached at _____.
[insert IRA donor telephone #]

Sincerely,

[IRA Donor Account Owner including Donor address and telephone number]

[NOTE: Please include with this letter, a copy of the Donor QCD IRA Administrator letter]