

SAMPLE TRANSFER INSTRUCTIONS FOR QUALIFIED IRA GIFTS TO LEHIGH

Name of Account Owner/Donor
Address
City, State ZIP
Phone number

Date

Name of IRA administrator
Address
City, State ZIP

RE: Request for Direct Qualified Charitable Distribution from IRA

Dear Sir or Madam:

Please accept this letter as my request to make a direct qualified charitable distribution from my Individual Retirement Account (IRA) # _____ as authorized under section 408(d)(8) of the Internal Revenue Code (IRC).

Please issue a check in the amount of \$ _____, payable to Lehigh University, and send the check to the following address:

Lehigh University
Lorraine Wiedorn
Asst. Vice President, Planned Giving
306 S. New Street, Suite 500
Bethlehem, PA 18015-1652

The qualified charitable organization's federal tax identification number is 24-0795445.

In your transmittal to Lehigh University, please reference my name and address as the donor of record in connection with this transfer, and copy me on the transmittal.

It is my intention that this gift complies with IRC §408(d)(8). It is also my intention to have this transfer qualify during the 2020 tax year. Therefore, please be sure to postmark it no later than December 31, 2020.

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,

Donor Name