

Sample IRA Distribution Letter Instructions:

First, contact your IRA administrator and see if they have a form that you can use to make an IRA direct charitable gift request. If that is not available, the following page offers a sample letter that can be used to request a direct distribution from an IRA (Individual Retirement Account) to Brown and other important charities. (This sort of gift is only available to individuals who are over age 70 ½.)

You may print the sample letter and simply fill in the blanks by hand as follows:

- 1) Enter the name and address of your IRA custodian/administrator.
- 2) Enter the date.
- 3) Enter your IRA account number.
- 4) Enter the amount you wish to transfer to Brown.
- 5) State where you would like the gift to be directed.
- 6) Include a phone number or email address where you can be contacted.
- 7) Sign the letter, print your name as the Plan Owner, and include your return mailing address.

We recommend keeping a copy of the letter for your records.

Remember, this sort of gift is NOT income to you and, therefore, it is NOT tax-deductible. Nonetheless, the gift counts toward your Required Minimum Distribution (RMD). This is a great option for anyone who does not itemize charitable deductions and/or anyone who does not want to incur that additional RMD income.

