

## Sample Letter of Instruction from Donor to Plan Provider for 2013 Gifts

[DATE]

[NAME OF PLAN PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

Re: Request for Direct Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable contribution from my Individual Retirement Account Number:

**[insert account number]**

as provided by American Taxpayer Relief Act of 2012 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$ \_\_\_\_\_ payable to the Children's Institute of Pittsburgh at the following address:

The Children's Institute of Pittsburgh  
1405 Shady Avenue  
Pittsburgh, PA 15217

In your transmittal to the Children's Institute, please state my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the 2013 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2013.

**[ALTERNATE INSTRUCTIONS TO PLAN PROVIDER: YOU MAY REPLACE THE LANGUAGE FROM THE CHECKBOX TO THE PARAGRAPH IMMEDIATELY ABOVE WITH THE FOLLOWING]**

Please issue a check in the amount of \$ \_\_\_\_\_ payable to the Children's Institute of Pittsburgh and send the check directly to me at my address of record.

If you have any questions or concerns regarding this request, I can be reached at [PHONE AND EMAIL ADDRESSES].

Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

[DONOR NAME]