

# Sample Letter for IRA Transfers to Falmouth Academy

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account to Falmouth Academy

(Date)

RE: Request for Charitable Distribution from Individual Retirement Account

# \_\_\_\_\_ n/o \_\_\_\_\_

Dear Sir or Madam:

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

Please issue a check in the amount of \$\_\_\_\_\_ (not to exceed \$100,000) payable to Falmouth Academy at the address below:

Development Office  
Falmouth Academy  
7 Highfield Drive  
Falmouth, MA 02540  
Attention: Jayne M. Iafrate

In your transmittal to Falmouth Academy, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of Falmouth Academy. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion during the 2007 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2007.

If you have any questions or need to contact me, I can be reached at (telephone). Thank you for your assistance in this matter.

Sincerely,

(Plan Owner Name)  
(Plan Owner Address)