

Date \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(Name and address of trustee/administrator)

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement 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 issue a check in the amount of \$ \_\_\_\_\_ to fund \_\_\_\_\_ payable to the organization at address below:

California State University, Fresno Foundation  
5244 N. Jackson Avenue M/S KC45  
Fresno, CA 93740-8023  
Tax ID: 94-6003272

Attn: Carol Widmer

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

It is my intention to have this transfer qualify for exclusion during the 200\_ tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 200\_.

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)

Date \_\_\_\_\_

Ms. Carol Widmer  
Director of Planned Giving  
California State University, Fresno  
5244 N. Jackson Avenue, M/S KC45  
Fresno, CA 93740-8023

Dear Carol:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to your organization in the amount of \$\_\_\_\_\_ to fund \_\_\_\_\_ from my plan trustee/administrator, \_\_\_\_\_ ( name of trustee/administrator).

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 transferred to me by your organization 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 can be reached at \_\_\_\_\_ (telephone).

Sincerely,

(donor)