

Sample Letter from Donor to Plan Provider

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 in the amount of \$ _____ from my Individual Retirement Account Number (insert account number) as provided by the Protecting Americans from Tax Hikes Act of 2015 in accordance with the following instruction:

_____ **By check:**

Checks must be made payable to Marquette University and sent to the following address:

- Marquette University Advancement
ATTN: Missy Egelhoff
1250 W. Wisconsin Ave., Suite 421
P.O. Box 1881
Milwaukee, WI 53201-1881

_____ **By wire transfer:**

To wire currency to Marquette University:

Transfer should be made in US Dollars. Provide the transferring institution the following information for Marquette:

- Marquette's Financial Institution: Town Bank

- ABA #: 075917843
- Account Name: Marquette University
- Account Number: # 0000145651
- Contact/Phone Number: Sarah Grooms / 262-369-8809

In your transmittal to Marquette, please memorialize 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 20__ tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 20__.

If you have any questions or concerns regarding this request, I can be reached at (telephone or e-mail address). Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,

Name of Donor