

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 from my Individual Retirement Account.

Account Number: [REDACTED]

Please issue a distribution in the amount of \$ [REDACTED] payable to the **University of Colorado Foundation**.

Mail Instructions

University of Colorado Foundation
1800 Grant Street, Suite 725
Denver, CO 80203

Wire Instructions

Wells Fargo Bank, NA
420 Montgomery St.
San Francisco, CA 94104
ABA #: 121 000 248
University of Colorado Foundation
Acct. #: 1828100820

Security Transfer Instructions

- Brokerage Firm: UBS Financial Services, Inc.
- DTC Number: 0221
- For Credit To: University of Colorado Foundation
- Taxpayer Identification Number:: 84-6049811
- Account Number: AB-06753-A0

In your transmittal to the University of Colorado Foundation, please list me as donor, and my address of record, and copy me on your transmittal. It is my intention to have this transfer qualify during the 2020 tax year. Therefore, it is imperative that this distribution be received **by the Foundation if transmitted by wire or electronic transfer not later than December 31, 2020 or be postmarked no later than December 31, 2020.**

If you have any questions regarding this request, contact me at (telephone and e-mail address).

Thank you for your prompt attention.

Sincerely,

Donor Name