**Sample Letter of Instruction**

**Donor to IRA Plan Administrator**

(Call your plan administrator to determine the most efficient way to send this letter of instruction)

[DATE]

[NAME OF IRA PROVIDER]

[ADDRESS]

[CITY, STATE, ZIP]

Re:  Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

I intend to make a qualified charitable distribution from my Individual Retirement Account to the University of San Francisco.  I have provided USF with separate instructions regarding my stated gift purpose which is to support the *Lone Mountain Legacy Scholarship*.

This transfer shall be made as defined by the *Protecting Americans from Tax Hikes Act of 2015* and Sec. 408(d)(8) of the Internal Revenue Code.  Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_ as a distribution from account number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, with check made payable to the “University of San Francisco.”

**Please mail check to:**

USF—Attention: Polly McMullen

2130 Fulton Street—Lone Mountain Rossi Wing LMR 314

San Francisco, CA 94117

USF’s Federal Tax ID #94-1156628

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

If you have any questions or concerns regarding this request, I can be reached at [PHONE AND EMAIL ADDRESS], or you may contact Polly McMullen at (415) 422-4340.

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

Sincerely yours,

[DONOR NAME]

CC:  Polly McMullen