

**CAROLINA DONOR  
123 MAIN STREET  
CITY, STATE ZIP**

*Sample Letter to Plan Administrator*

Date

Name of Company

Address

City, State, Zip

Dear Plan Administrator:

Please accept this letter as my instruction to direct a charitable distribution from my Individual Retirement Account # \_\_\_\_\_ to The University of North Carolina at Chapel Hill Foundation, Inc., a 509(a)(1) charitable organization, as provided by Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, and extended under the Protecting Americans From Tax Hikes Act of 2015. The Foundation's tax identification number is 59-1711424.

Please issue a check, payable to The University of North Carolina at Chapel Hill Foundation, Inc., in the amount of \$\_\_\_\_\_ and mail it to:

The University of North Carolina at Chapel Hill  
Office of Gift Planning  
Post Office Box 309  
Chapel Hill, NC 27514-0309

It is my intent that this distribution qualify for the 2017 tax year. In your transmittal letter to the Foundation, please include my name and address as the donor for this transfer. Please copy me on your transmittal letter.

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

Sincerely,

Carolina Donor