

Sample Instruction Letter for IRA Charitable Distribution to Punahou

DATE: _____

(Broker Name) _____

(Broker Address) _____

RE: Request for Charitable Distribution from Individual Retirement Account

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ directly to Punahou School. The taxpayer identification number of Punahou School is 99-0073523. Please issue a check in the amount of \$ _____ payable to Punahou School and send it to the address below:

Punahou School
Advancement Office
1601 Punahou Street
Honolulu, HI 96822
(808) 944-3583

Attn: (Lisa Becker)

In your transmittal to Punahou School, please memorialize my name and address as the donor of record in connection with this transfer. If possible, please also indicate that I want the gift to support _____

Please copy me on your transmittal.

If you have any questions or need to contact me, I can be reached at _____.

Thank you for your assistance in this matter.

Sincerely,

(Plan Owner)

cc: Carrie Ogami
Advancement Office, Punahou School
1601 Punahou Street
Honolulu, HI 96822