

Sample Request from Plan Owner to Administrator for Charitable Distribution from Individual Retirement Account (IRA) to the American Repertory Theater (A.R.T.).

Please complete all highlighted sections.

If there is a specific fund you'd like to associate your gift to, e.g. Education or OBERON, please note it in the "this check is in the benefit of" line in the third paragraph. If you would like your gift to be directed to where it is needed most, please write "A.R.T.'s Annual Fund."

DATE

CUSTODY AGENT

CUSTODY ADDRESS

RE: Request for Charitable Distribution from Individual Retirement Account # [REDACTED] in the name of [REDACTED]

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # [REDACTED] as provided by The Trade Facilitation and Trade Enforcement Act of 2015.

Please issue a check in the amount of \$ [REDACTED] (not to exceed \$100,000) payable to "The American Repertory Theater" and mail it directly to the following address:

American Repertory Theater
64 Brattle Street
Cambridge, MA 02138
Attention: Emily Wilson

In your transmittal to the A.R.T., please give my name and address as the donor of record in connection with this transfer and indicate that the check is for the benefit of the [REDACTED]. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 201__ tax year. 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 Name

Plan Owner's Address