

_____, 2026

(Custody Agent / Address)

RE: Request for Charitable Distribution from Individual Retirement Account #_____
in the name of _____

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____.

Please issue a check in the amount of \$_____ (not to exceed \$111,000) payable to "The President and Fellows of Harvard College" and mail it directly to the following address:

Harvard Medical School
Alumni Affairs and Development
P.O. Box 419720
Boston, MA 02241-9720

In your transmittal to Harvard University, 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 _____ at Harvard Medical School. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 2026 tax year. HMS gifts are managed under the President and Fellows of Harvard College's federal tax identification number (#04-2103580).

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 / Address)