



**Thank you for helping our students at The W
through a gift from your Individual Retirement Account!**

The attached letters will help you make a transfer directly from your IRA.

Page 1. “From Plan Owner to IRA Administrator”
Please complete the underlined portions of the attached letter and send it to your IRA Plan Administrator to initiate the transfer.

Page 2. “From Donor to The MUW Foundation”
Upon initiating the transfer, please complete the underlined portions from the attached letter and send (as addressed) to:

Andrea Nester Stevens, Executive Director
MUW Foundation
1100 College Street, MUW-1618
Columbus, MS 39701

For assistance, please contact Andrea Nester Stevens at anstevens@muw.edu or (662) 329-7146.

**For more information on how IRA charitable rollover gifts and other tax-
advantaged ways to give can further your philanthropic and financial goals,
please send an email to:**

longblueline@muw.edu

FROM PLAN OWNER TO IRA ADMINISTRATOR

DATE

IRA PLAN ADMINISTRATOR

ADDRESS

CITY

STATE

ZIP CODE

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ pursuant Sec. 408(d)(8) of the Internal Revenue Code of 1986 as amended. I am 70 ½ years old or older.

Please issue a check in the amount of \$ _____ payable to:

MUW Foundation (FEIN 23-7050717)

And mail it as soon as possible, to arrive no later than 31 December 2022, to:

**Andrea Nester Stevens, Executive Director
MUW Foundation
1100 College Street, MUW-1618
Columbus, MS 39701**

In your communication to the MUW Foundation, please include my name and address as listed below as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have any questions, please contact Andrea Nester Stevens at (662) 329-7146 or anstevens@muw.edu.

Thank you for your assistance in this matter.

Sincerely,

PRINTED PLAN OWNER NAME

ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE NUMBER(S)

FROM DONOR TO THE MUW FOUNDATION

DATE

Andrea Nester Stevens, Executive Director
MUW Foundation
1100 College Street, MUW-1618
Columbus, MS 39701

Dear Mrs. Stevens:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to the MUW Foundation in the amount of \$ _____ from my plan trustee/administrator,

(NAME OF PLAN TRUSTEE/ADMINISTRATOR)

It is my intent to comply with Sec. 408(d)(8) of the Internal Revenue Code of 1986 as amended in connection with this gift. Accordingly, upon your receipt of payment from my trustee/ administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization, nor will it fund a life income agreement.

I intend that this gift be designated for:

The W Fund Owls Fund Club
 MUW Scholarship Fund Other _____

Sincerely,

PRINTED PLAN OWNER NAME

ADDRESS

CITY STATE ZIP CODE

TELEPHONE NUMBER(S)

EMAIL ADDRESS / FACSIMILE NUMBER