

IRA Charitable Rollover Instructions

FOR A QUALIFIED CHARITABLE DISTRIBUTION (QCD) FROM A TRADITIONAL IRA

1. Owner must inform their custodian/administrator of their desire to make a QCD. We suggest the following language.

Dear [IRA Custodian],

As the owner of IRA account #_____ that is in the custody of your organization, I request that you transfer from that account a check in the amount of \$_____, payable to Wittenberg University, a qualified 501(c)(3) organization, designated to _____. The Treasury Tax ID Number for The Board of Directors of Wittenberg College dba Wittenberg University is 31-0537177.

Please mail the check to:

Wittenberg University
Office of Advancement
P.O. Box 720
Springfield, OH 45501

In your transmittal letter to Wittenberg, please include my name and address as the donor for this transfer. Please copy me on your transmittal letter.

It is my intention that this Qualified Charitable Distribution (QCD) will fulfill part or all of my IRA required minimum distribution for the year 20____.

This letter is sufficient authorization for you to make this QCD gift. However, if you require any further documents, please forward those to me for my attention and/or signature.

Cordially yours,
[IRA Owner]

2. Please make the check payable to Wittenberg University only and NOT Wittenberg University and the IRA Owner; have the custodian mail it directly to Wittenberg. The check and accompanying letter should include the name of the account holder.

3. The donor is asked to send a brief message by email or fax to Wittenberg notifying them of their gift. We suggest the following language:

Dear Mr. Nelson,

Please be advised that I have executed by written request a QCD from my IRA account at [company name] in the amount of \$_____. This gift is intended to support _____.

[Donor Name (first & last)]
[Address, City, State Zip, Phone, Email]

Note: Wittenberg will issue you a gift acknowledgement once the check is received. If you have any questions or need additional information, please call Chris Nelson at 937-591-1479 or email nelsonc20@wittenberg.edu.

OFFICE OF PLANNED GIVING

937-327-7430 · planned-giving@wittenberg.edu
wittenberg.giftlegacy.com · 937-327-7444 (fax)

Mailing Address: P.O. Box 720 · Springfield, OH 45501

Physical Address: 234 W. Ward Street · Springfield, OH 45501

Campus Address: Bayley Alumni House