

HOW TO MAKE A CHARITABLE IRA ROLLOVER GIFT TO THE OHIO UNIVERSITY FOUNDATION

Are you taking required minimum distributions from your IRA this year? Make a qualified charitable distribution to The Ohio University Foundation and reduce your taxes.

ohiolegacy.org



STEP 1: CONTACT YOUR CUSTODIAN

Contact your Individual Retirement Account (IRA) plan custodian to request a direct charitable distribution from your IRA to The Ohio University Foundation.



STEP 2: REQUEST A CHECK

Request that your custodian issue a check (in an amount up to \$111,000) payable to The Ohio University Foundation. Designation of money can be specified via a note included with your request.

Include The Ohio University Foundation's Tax ID number:
31-6402269

Your custodian can send these materials to the following address: *The Ohio University Foundation*
P.O. Box 869, Athens, OH 45701

*Please have your custodian contact Kelli Kotowski at 740.597.1819 or kotowskk@ohio.edu for Electronic Funds Transfer (EFT) instructions.

If you are writing a check from your "IRA checkbook," please note that the gift is not considered completed until the funds are withdrawn from your custodial account. For year end processing, please mail your check by December 1 to ensure your gift qualifies for the current tax year Required Minimum Distribution.



STEP 3: CONTACT US

To ensure that your gift is properly processed, please contact Kelli Kotowski at 740.597.1819 or kotowskk@ohio.edu to notify our office that a distribution is forthcoming. Please let us know the amount of your gift, the gift designation, and the name of the custodian.



STEP 4: RECEIVE ACKNOWLEDGEMENT

The Ohio University Foundation will provide you written acknowledgement shortly after the gift is received.

