

# 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.

[ohio.edu/advancement/yearendgift.cfm](http://ohio.edu/advancement/yearendgift.cfm)

## 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 \$100,000) 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](mailto:kotowskk@ohio.edu) for Electronic Funds Transfer (EFT) instructions.

## STEP 3: CONTACT US



To ensure that your gift is properly processed, please contact Kelli Kotowski at 740.597.1819 or [kotowskk@ohio.edu](mailto: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 ACKNOWLEDGMENT



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



*The Ohio University Foundation*