

Utah State University

Office of Planned Giving

IRA Qualified Distribution Gift Form

This form is to be used to facilitate the making of a charitable gift to Utah State University from an IRA account, per the approval of the "tax extenders" and Section 408 (d)(8) of the Internal Revenue Code of 1986, as amended. This provision has been made permanent.

Please provide the following information to your IRA custodian to complete the gift process. If you have further questions concerning your eligibility for this opportunity, please consult your own legal or tax advisor.

I, _____, would like to direct an IRA distribution to be sent directly to Utah State University. I am pleased to inform you that I have requested a qualified charitable distribution to

_____ at
[Name of specific fund or purpose]

Utah State University from my Individual Retirement Account as described below.

IRA Plan Trustee/Administrator Name: _____

Account Number: _____

Distribution Amount: _____

Comments: _____

It is my intention that this IRA rollover gift comply with the "qualified charitable distribution" requirements of Section 408(d)(8) of the Internal Revenue Code. Accordingly, when payment is received from my trustee/administrator, please send me a contemporaneous written acknowledgement that includes the amount of my gift, states that no goods or services were transferred to me in consideration for this gift, and indicates that my gift will not be placed in a donor advised fund or supporting organization. Please contact me if you have any questions.

Donor's Signature: _____ Date: _____

Printed Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ email : _____

The IRA distribution can be mailed to:

Utah State University
1540 Old Main Hill
Logan, UT 84322-1520

Or, it can be sent electronically from the IRA custodian to Utah State University via ACH as follows:

Bank Name: Wells Fargo Bank
Address: 889 S Main St., Logan UT 84321
Swift Code: WFBIUS6S
ABA: 121 000 248
Account #: 034 08024 12

Utah State University is a 501(c)(3) and a 509(a)(1) charitable educational organization. As such, any donations made to Utah State University are tax deductible to the extent provided by law. The tax identification number of Utah State University is 87-6000528.

To ensure appropriate gift acknowledgement, a copy of this completed form should also be sent to:

Wendy Oliverson
Advancement Services
Utah State University
1590 Old Main Hill
Logan, UT 84322-1520

Wendy.oliverson@usu.edu

Questions?

Contact Wendy Oliverson, Asst. Director Gift Management, at 435-797-1327 or wendy.oliverson@usu.edu