



IRA Charitable Gift Instructions

Request for your IRA administrator to make a charitable distribution from your account

Financial institution contact information

By this letter, I request that you make a direct charitable distribution to Trine University from my Individual Retirement Account No. _____ as provided by the Protecting Americans from Tax Hikes Act of 2015.

Please issue a distribution in the amount of \$ _____ payable to Trine University.

Distribution by CHECK	OR	Distribution by WIRE TRANSFER
Mail to: Trine University University Advancement 1 University Avenue Angola, IN 46703		Citibank NA 111 Wall Street New York, NY 10043 ABA # 021-000-089 FBO Charles Schwab & Co. Account #: 4055 3953 For the account of: Trine University Account #: 6262 4444

In your transmittal to Trine University (tax ID #35-0715530), please indicate my name as the IRA owner of record in connection with the transfer. Please copy me on your transmittal.

Donor name

Date

Donor contact information

CIRCULAR 230 NOTICE: Any statements contained herein are not intended or written to be used, and cannot be used, by the recipient or any other taxpayer, for avoiding any penalties that may be imposed by federal tax law.

Revised 10/23/2020



IRA Transfer Notification

To notify Trine University of a charitable distribution directly from your IRA

Send to:

Trine University
University Advancement
1 University Avenue
Angola, IN 46703

I am pleased to inform you that I requested that my IRA custodian/administrator, _____, make a qualified charitable distribution from my Individual Retirement Account to Trine University in the amount of \$_____.

Upon receipt of the transfer from my IRA, please send me a written acknowledgment that states the amount of my gift, that confirms that no goods or services were transferred to me in consideration for this gift, and that my gift will not be placed in a donor-advised fund or supporting organization nor in an income producing charitable split interest trust or annuity.

My gift should be allocated to the following purpose:

(If this gift is a payment on an existing pledge, please indicate that in the space above.)

Donor name

Date

Donor contact information

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