

WABASH COLLEGE

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, and we suggest using the following message:

Dear IRA Custodian,

Sec. 408(d)(8)(A) of the Internal Revenue Code permits an IRA rollover directly from an IRA custodian to a qualified public charity. As the owner of IRA account # _____, that is in the custody of your organization, I request that you transfer from that account the sum of \$___ to Wabash College, located 301 W. Wabash Ave., P.O. Box 352, Crawfordsville, IN 47933. The Treasury Tax ID Number for Wabash College is 35-0868202.

It is my intention to make a Qualified Charitable Distribution (QCD) to Wabash College from my IRA as permitted by law. This 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 payable to Wabash College *only*, and NOT Wabash College and the IRA Owner; have custodian mail directly to Wabash—check should include name of account holder.
3. Donor is asked to send a brief message by e-mail or fax to Wabash which reads:

Joseph Klen (E-mail: klenj@wabash.edu or Fax: 765-361-6424)

Associate Dean for College Advancement

Wabash College

P.O. Box 352

Crawfordsville, IN 47933

Dear Mr. Klen,

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 for _____.

Donor Name (first & last)

Address (City, State Zip) Phone and E-mail

NOTE: Wabash will issue gift acknowledgement once the check is received. If you have any questions, please call Joe Klen at 765-361-6052.