

Making a Gift from an IRA

1. Use the IRA distribution forms provided by your IRA custodian and the attached sample letter to direct that a distribution be made to the University of Chicago at the following address:

The University of Chicago
Telly Green
Gift Administration and Business Data
5235 South Harper Court
4th Floor
Chicago, IL 60615-4113

2. Use the attached cover letter to transmit the IRA distribution form to your IRA custodian. The letter specifically requests that your IRA custodian (a) memorialize your name and address as the donor of record in connection with this transfer and (b) copy you on the transmittal. We recommend that you also email or fax a copy of your IRA distribution form and your transmittal letter to Telly Green in Gift Administration and Business Data at gifts@uchicago.edu or (773) 702-9675 (fax).
3. Please indicate where you would like your gift to be used.



Office of Gift Planning
5235 South Harper Court
Chicago, Illinois 60615

giftplan@uchicago.edu
giftplanning.uchicago.edu
T 773.702.3130
F 773.702.9480

Sample Letter from Donor to IRA Custodian

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

The Protecting Americans from Tax Hikes (PATH) Act of 2015 permits a tax-free rollover from an Individual Retirement Account to a qualified public charity. Please accept this letter and the enclosed distribution form as my request to make a direct charitable distribution from my IRA # _____ to the University of Chicago.

Please issue a check in the amount of \$_____ payable to "The University of Chicago," and send it to the address listed below:

The University of Chicago
Telly Green
Gift Administration and Business Data
5235 South Harper Court
4th Floor
Chicago, IL 60615-4113
Purpose: _____

In your transmittal to the University, please memorialize my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

If you have any questions or need to contact me, I can be reached at _____.

Thank you for your assistance in this matter.

Sincerely,

(Plan Owner)

cc: Telly Green gifts@uchicago.edu | (773) 702-9675 (fax)