



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 and completed form can be mailed to:

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

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.

Questions?

Contact USU Advancement Services at 435-797-0014 or  
[advgifts@usu.edu](mailto:advgifts@usu.edu)