

Instructions for:
IRA Administrator

Initiating Your QCD Request with Your **IRA Administrator**

To initiate a Qualified Charitable Distribution (QCD) with your Individual Retirement Account (IRA) Administrator, please fill in the attached template with your relevant information and send to your IRA Administrator OR contact your IRA Administrator for their QCD distribution form and details on their process for making such a gift.

Then, notify Columbia of your gift by sharing your completed *Notification of Forthcoming QCD from Administrator* document in any of these ways:

- Email an image to gift.planning@columbia.edu
or
- Email a pdf to gift.planning@columbia.edu
or
- Mail to: Columbia University, Office of Gift Planning, 622 W 113th Street MC4518, New York, NY 10025

TEMPLATE DOCUMENT

QCD Request to IRA Administrator

NOTE: This letter may need a signature guarantee. The IRA owner should ask the IRA custodian about signature requirements, the mailing address, and whether the custodian requires any other documents in order to make the transfer.

Date

Administrator Name

Address

City, State Zip

RE: Request for a Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this [email or letter] as my request and authorization for you to make a qualified charitable distribution from my Individual Retirement Account # _____ as provided by the Tax Increase Prevention Act of 2014 and Sec. 408(d)(8) of the Internal Revenue Code of 1986.

Please issue a check in the amount of \$ _____ payable to “**Columbia University**” and send the check to:

Columbia Alumni Center
Attn: Gift Systems - QCD
622 West 113th Street, MC 4524
New York, NY 10025
Phone number (if needed): 212-851-7995

In your transmittal to Columbia University, please include my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal. For your reference, the federal tax identification number for Columbia University is 13-5598093.

It is my intention that this transfer qualify for exclusion from income during the 2024 tax year. Therefore, it is imperative this distribution check be postmarked as near to December 15, 2024 as possible.

Thank you for assisting me with this gift. If you have any questions, please call me.

Sincerely,

Donor

Address

Telephone Number