

Instructions for:
Columbia University

Instructions for Notifying Columbia of Your Qualified Charitable Distribution (QCD) Gift

To make a Qualified Charitable Distribution (QCD) from your Individual Retirement Account (IRA) to Columbia University, please fill in the attached template with your relevant information.

Then, notify Columbia of your gift by sharing your completed 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
Columbia Alumni Center
Office of Gift Planning
ATTN: Ryan Hart, Executive Director of Gift Planning
622 West 113th Street, MC 4518
New York, NY 10025

TEMPLATE DOCUMENT

**IRA Owner to Columbia:
Notification of Forthcoming QCD from Administrator**

Columbia University
Columbia Alumni Center
Office of Gift Planning
ATTN: Ryan Hart, Executive Director of Gift Planning
622 West 113th Street, MC 4518
New York, NY 10025

Dear Mr. Hart:

Please accept this [email or letter] as notification that I have requested a qualified charitable distribution from my Individual Retirement Account in the amount of \$_____ from my plan trustee/administrator:

[Name of IRA trustee/administrator]
[IRA trustee/administrator contact information]

It is my intent to comply with current legislative requirements in connection with a qualified charitable distribution from my IRA.

Please direct this distribution for the benefit of [SCHOOL] to be used for [PURPOSE/FUND NAME].

Accordingly, upon your receipt of payment from my trustee/administrator, please send me a contemporaneous written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by Columbia University in consideration for this gift, and that my gift will not be placed in a private foundation, donor advised fund or supporting organization.

If you have any questions or need to contact me, I can be reached at [TELEPHONE NUMBER].

Sincerely,

[SIGNATURE] [DATE]

[Donor Name]
[Donor Address]
[Donor Email]