



IRA Rollover Gift Instructions

Thank you for considering a gift to Bradley University!

On the subsequent pages you will find two letters:

- A letter to your plan trustee/administrator requesting a Charitable Distribution from your IRA to Bradley University
- A letter to Charlie Roy, Executive Director of Development and Planned Giving at Bradley University, informing him of your intentions

Please print, sign, and mail (or email) these letters to the appropriate place.

Should you have any questions, please contact Charlie Roy at CRoy@bradley.edu or by calling (309) 677-2241.

Date: _____

Plan Trustee/Administrator: _____

Dear _____

RE: Request for Charitable Distribution from Individual Retirement Account

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account No. _____ as provided by the PATH Act – (Protecting Americans from Tax Hikes Act) of 2015 which permanently extends the ability of individuals at least 70½ years of age to exclude from gross income qualified charitable distributions from Individual Retirement Accounts (IRAs).

Please issue a check in the amount of \$ _____ payable to Bradley University and mail the check to the address below:

Bradley University
Gift Records – Swords Hall 10
1501 W. Bradley Avenue
Peoria, IL 61625

Bradley University TIN: 37-0661494

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

It is my intention to have this direct charitable distribution be excluded from my gross income for the 2023 tax year. Therefore, it is imperative this distribution be postmarked no later than December 31, 2023.

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]

Date: _____

Mr. Charlie Roy
Executive Director of Development and Planned Giving
Bradley University
Hayden-Clark Alumni Center
1501 W. Bradley Avenue
Peoria, IL 61625

Dear Mr. Roy,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to Bradley University in the amount of \$_____
from my plan trustee/administrator, _____.
(name of trustee/administrator of IRA)

I would like this gift credited to _____
(name of fund or purpose at Bradley).

It is my intention to have this direct charitable distribution be excluded from my gross income for the 2023 tax year as provided in the PATH Act – (Protecting Americans from Tax Hikes Act) of 2015.

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 Bradley University in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

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

Sincerely,

(name of donor)