



IRA Charitable Gift Instructions

Request for your IRA administrator to make a charitable distribution from your account

Financial institution contact information

By this letter, I request that you make a direct charitable distribution to Saint Mary's College from my Individual Retirement Account No. _____ as provided by the Protecting Americans from Tax Hikes Act of 2015.

Please issue a distribution in the amount of \$ _____ payable to Saint Mary's College.

Distribution by CHECK	OR	Distribution by WIRE TRANSFER
Mail to: Office of Development c/o Jordan Marshall Saint Mary's College 110 Le Mans Hall Notre Dame, IN 46556-5001		1st Source Bank P.O. Box 1602 South Bend, IN 46634 ABA #071212128 Account #107-190-1 Beneficiary: Saint Mary's College

In your transmittal to Saint Mary's College (tax ID #35-0868158), please indicate my name as the IRA owner of record in connection with the transfer. Please copy me on your transmittal.

Donor name

Date

Donor contact information

CIRCULAR 230 NOTICE: Any statements contained herein are not intended or written to be used, and cannot be used, by the recipient or any other taxpayer, for avoiding any penalties that may be imposed by federal tax law.

Revised 10/23/2020



IRA Transfer Notification

To notify Saint Mary's College of a charitable distribution directly from your IRA

Send to:

Office of Development
c/o Jordan Marshall
Saint Mary's College
110 Le Mans Hall
Notre Dame, IN 46556-5001
Email: jmarshall@saintmarys.edu

I am pleased to inform you that I requested that my IRA custodian/administrator, _____, make a qualified charitable distribution from my Individual Retirement Account to Saint Mary's College in the amount of \$_____.

Upon receipt of the transfer from my IRA, please send me a written acknowledgment that states the amount of my gift, that confirms that no goods or services were transferred to me in consideration for this gift, and that my gift will not be placed in a donor-advised fund or supporting organization nor in an income producing charitable split interest trust or annuity.

My gift should be allocated to the following purpose:

(If this gift is a payment on an existing pledge, please indicate that in the space above.)

Donor name

Date

Donor contact information