

GIFT OF IRA ROLLOVER / CHARITABLE DISTRIBUTION REQUEST

[DATE]

{VENDOR NAME
ADDRESS
CITY, STATE, ZIP}

RE: ACCOUNT # _____

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable contribution from my Individual Retirement Account (number below). It is my intent that this gift will comply with Internal Revenue Code provisions for an IRA charitable rollover under the Protecting Americans from Tax Hikes Act (PATH) of 2015, which went into effect December 18, 2015.

Please issue a check or electronic payment in the amount of \$ _____

from my account # _____ payable to CSULB 49er Foundation and mail to:

CSULB 49er Foundation
Gift Processing Department
6300 State University Drive, Suite 332
Long Beach, CA 90815

You may wire funds to the CSULB 49er Foundation by sending it to:

BANK NAME: Wells Fargo Bank, N.A.
Account Name: CSULB 49er Foundation
Account Number: 4124324005
Bank Routing Number/ABA: 121000248

BENEFICIARY NAME: CSULB 49er Foundation
6300 State University Drive, Suite 332
Long Beach, CA 90815

Phone: (562) 985-5537

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

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

Thank you for your assistance in this matter.

Sincerely,

[Plan Owner Typed Name]