Instructions for Making an IRA Rollover Gift to Valparaiso University

Thank you for considering a gift to Valpo!

On the subsequent pages you will find two letters:

- A letter to your plan trustee/administrator requesting a charitable distribution from your IRA to Valparaiso University
- A letter to Advancement at Valparaiso University, informing them of your intentions

Please print, sign, and mail (or email) these letters to the appropriate place. Should you have any questions, please contact Advancement at giftplanning@valpo.edu or (219) 464-5227.

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.

Please issue a check in the amount of $ _____ payable to Valparaiso University at the address below:

Valparaiso University
Advancement
Heritage Hall
1700 Chapel Drive
Valparaiso, IN 46383

Valparaiso University TIN: 35-0868125

In your transmittal to Valparaiso 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 transfer qualify for exclusion during the 2026 tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, 2026.

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: _____

Advancement Valparaiso University
Heritage Hall
1700 Chapel Drive
Valparaiso, IN 46383

Dear Mrs. Radtke,

It is my pleasure to inform you that I have requested a qualified charitable distribution from my individual retirement account payable to Valparaiso 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 Valpo).

It is my intent to comply with the requirements of the PATH Act of 2015 in making this distribution directly from my IRA.

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 Valparaiso 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)