

Notice of IRA Rollover Gift To:

Office of Planned Giving
UC Santa Cruz
1156 High Street - UR
Santa Cruz, CA 95064

Attention: Virginia Rivera, Senior Director of Planned Giving

Dear Virginia,

I am pleased to inform you that I have requested a qualified charitable distribution to UC Santa Cruz Foundation from my Individual Retirement Account as described below.

IRA Plan Trustee/Administrator Name: _____

Account Number: _____

Distribution Amount: _____

Comments: For the benefit of (insert program or department name)

It is my intention that this IRA rollover gift comply with the "qualified charitable distribution" requirements of Section 408(d)(8) of the Internal Revenue Code. Accordingly, when payment is received from my trustee/administrator, please send me a contemporaneous written acknowledgement that includes the amount of my gift, states that no goods or services were transferred to me in consideration for this gift, and indicates that my gift will not be placed in a donor advised fund or supporting organization.

Sincerely,

Donor's Signature: _____ Date: _____

Printed Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ email address: _____