



COLLEGE *of*  
CHARLESTON  
FOUNDATION

## Instructions for IRA Rollover gifts to the College of Charleston Foundation

### **1) Contact your IRA plan administrator to make a gift from your IRA to the College of Charleston Foundation.**

Your administrator may want to know the following:

Address: College of Charleston Foundation  
Sottile House  
66 George Street  
Charleston, SC 29424

College of Charleston Foundation Tax ID# 23-7069236

### **Additional information: (it is important that the administrator provide this information to assure the donor receives proper credit):**

- **Donor's name**
- **Purpose of the gift. (Unrestricted or restricted...If restricted, please mention the program or endowed fund to which the gift should be applied)**

### **2) The donor should notify the Foundation of the expected IRA Rollover gift.**

Foundation Contact: Peggy Cieslikowski, Director of Planned Giving, 843-953-6475

### **3) The Donor shall receive an acknowledgement letter from the Foundation, based on the information provided by the IRA plan administrator.**

As the law is currently written, you should be able to take advantage of the Charitable IRA Rollover if all of the following apply:

1. You are at least 70 1/2 years old when you make the gift;
2. The gift is paid directly from your IRA account to the College of Charleston Foundation;
3. The gift is mailed or transferred directly to the College of Charleston Foundation;
4. The total of your charitable distribution to the College of Charleston Foundation and all other charities under the IRA Rollover provision is no more than

- \$100,000 in 2016; and
5. Your gift is completed before December 31, 2016.

If you have any questions, please contact Peggy Cieslikowski at (843) 953-6475  
or via e-mail at [cieslikowskiph@cofc.edu](mailto:cieslikowskiph@cofc.edu)

Thank You!