

## CHARITABLE IRA ROLLOVER DONOR INSTRUCTIONS

To be able to anticipate receipt of your gift and designate it to the purpose you choose, please complete and send a copy of this form to:

Southern Illinois University Foundation  
Mailcode 6805  
Southern Illinois University  
1235 Douglas Drive  
Carbondale, IL 62901  
Phone: (618) 453-4900

I have requested a qualified charitable distribution from my Individual Retirement Account (IRA) to the Southern Illinois University Foundation in the amount of \$ \_\_\_\_\_ from my IRA trustee/custodian/administrator, \_\_\_\_\_ (name of IRA trustee/custodian/administrator).

It is my full intention to comply with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 403(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift.

I intend my gift to be for the following purpose:

\_\_\_\_\_ SIU's general purposes

\_\_\_\_\_ Other

If other, please specify purpose: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

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 SIU Foundation;
3. The gift is mailed or transferred directly to the SIU Foundation;
4. The total of your charitable distribution to the SIU Foundation and all other charities under the IRA Rollover provision is no more than \$100,000 in 2013; and
5. Your gift is completed before December 31, 2013.

Thank you.