



# University of New Haven

## IRA Charitable Transfer Instructions

Date: \_\_\_\_\_

To: \_\_\_\_\_  
(Firm that administers my IRA Account)

Address: \_\_\_\_\_

City/State/Zip \_\_\_\_\_

From:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone number: \_\_\_\_\_ Email: \_\_\_\_\_

I am hereby requesting that you make a direct qualified charitable distribution from my Individual Retirement Account # \_\_\_\_\_ to the University of New Haven as provided for under the Tax Increase Prevention Act of 2015 and section 408(d)(8) of the Internal Revenue Code of 1986, as amended. The University of New Haven's tax identification number (EIN) is 06-0761704.

\_\_\_\_ Please transfer funds, or issue a check, in the amount of \$ \_\_\_\_\_, payable to the **University of New Haven** and mail to address on page 2.

\_\_\_\_ Please transfer the following securities to the University of New Haven (Name and number of shares):

\_\_\_\_\_

For instructions to wire transfer securities, please use this link:

[www.newhaven.edu/give/ways-to-give/securities.php](http://www.newhaven.edu/give/ways-to-give/securities.php)

**In your transmittal to the University of New Haven, please include both pages of this form, which shows my name and address as the donor of record, indicates that the transfer is being made from my IRA account, and notifies the University of the purpose of my gift. Please copy me on your transmittal.**

If you need to contact me, I can be reached at the following phone number: \_\_\_\_\_, or the following email address: \_\_\_\_\_.

Thank you for your assistance with this transfer.

Sincerely,

Printed name: \_\_\_\_\_

Signature: \_\_\_\_\_

**Donor Instructions to the University of New Haven**

I intend my gift to be used for the following purpose:

\_\_\_\_ Unrestricted Annual Fund

\_\_\_\_ Annual Scholarship Fund

\_\_\_\_ Pledge Payment on my existing pledge for \_\_\_\_\_

Establishing a new named fund - we will contact you for details

Phone number: \_\_\_\_\_

\_\_\_\_ Other, please specify: \_\_\_\_\_

Printed donor name: \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**If you would like to transfer funds directly, please email [gifts@newhaven.edu](mailto:gifts@newhaven.edu) for wire transfer instructions.**

**So that we may properly credit this gift for the intended purpose, please send a copy of this form to Advancement Services at [gifts@newhaven.edu](mailto:gifts@newhaven.edu) or the address below.**

**If sending the donation by mail, please enclose a copy of this form and mail to:**

**Office of Advancement  
University of New Haven  
300 Boston Post Road  
West Haven, CT 06516**

For questions, please contact Alex Salzano, Assistant Director of Advancement Services, at [asalzano@newhaven.edu](mailto:asalzano@newhaven.edu) or (203) 479-4114.