

Take Advantage Today!
Reduce your Taxes Through a Gift
From Your IRA to Cal State Fullerton

This year, instead of paying more in taxes, take advantage of the IRA rollover to help support your favorite program at Cal State Fullerton! The IRA Charitable Rollover is permanent law and if you are 70½ or older you can roll over up to \$100,000 from your IRA to charity. You won't be taxed on the transfer and it counts towards your required distribution. Best of all, it's easy!

An IRA rollover is a simple and easy way for you to use your IRA to help CSUF fulfill our mission. To make an IRA rollover gift, simply contact your IRA administrator and request that an amount be transferred to Cal State Fullerton through the Cal State Fullerton Philanthropic Foundation (CSFPF). You may transfer any amount gift could be up to \$100,000.

Don't delay! In order to take advantage of the IRA Rollover, you need make your gift by December 31st to count in the current tax year. (You need to act now, rollovers require several days to process.)

Below, we've included the information your IRA administrator will need to complete the gift. For any additional questions, please contact the CSUF Office of Planned Giving at (657) 278-3947 or CSUFPlannedGift@fullerton.edu.

IRA Rollover Gift Information

Fidelity Investments

Name on Account: Cal State Fullerton Philanthropic Foundation
Brokerage Information: Fidelity Investments - 714-672-0060
Account Number: Y02-153745
Routing Number: 122000496
DTC#: 0226

Charles Schwab & Company

Name on Account: Cal State Fullerton Philanthropic Foundation
Brokerage Information: Charles Schwab & Company - 800-435-4000
Account Number: 9464-6229
DTC#: 0164
Code: 40

Banking Information

Bank: Wells Fargo
Routing #: 121000248
Address: 500 N State College Blvd. Suite 1030
For: Cal State Fullerton Philanthropic Foundation-Operating
Reference # 7354329513

If by check, please issue a check in the amount of \$_____ payable to Cal State Fullerton Philanthropic Foundation at the following address:

Cal State Fullerton Philanthropic Foundation
University Advancement, Planned Giving
2600 Nutwood Ave., Suite 850

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Fullerton, CA 92831

*After any transfer is completed an e-mail should be sent to foundation@fullerton.edu with details of the transfer:

- a. Donor
- b. Name of security
- c. Number of units/shares
- d. Date of transfer
- e. Donor's contact information