

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

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. A single person can transfer \$100,000 tax-free annually. A married couple can transfer up to \$200,000 tax-free, over the same period, from separate accounts.

Don't delay! In order to take advantage of the IRA Rollover, you need make your gift by December 31<sup>st</sup> 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. A sample letter to your IRA administrator is also included.** For any additional questions, please contact the CSUF Office of Planned Giving at (657) 278-3947 or [CSUFPlannedGift@fullerton.edu](mailto: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  
Fullerton, CA 92831

\*After any transfer is completed an e-mail should be sent to [foundation@fullerton.edu](mailto:foundation@fullerton.edu) with details of the transfer: a. Donor, b. Name of security, c. Number of units/shares, d. Date of transfer, and, e. Donor's contact information.

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**Sample Letter from Donor to IRA Administrator and/or Plan Provider**

Name of Plan Provider  
Address  
City, State Zip

Re: Request for Direct IRA Charitable Rollover from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable contribution from my Individual Retirement Account Number (insert account number) as provided by the *Protecting Americans from Tax Hikes Act of 2015*.

If by electronic transfer, please transfer the amount of \$\_\_\_\_\_ directly to one of the following accounts:

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  
Fullerton, CA 92831

In your transmittal to the Cal State Fullerton Philanthropic Foundation, please memorialize my name and address as the donor of record in connection with this transfer, and copy me on your transmittal. It is my intention to have this transfer qualify during the current tax year. Therefore, it is imperative that this distribution is made no later than December 31st.

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Following the transfer, an e-mail should be sent to [foundation@fullerton.edu](mailto:foundation@fullerton.edu) with details of the transfer providing: a. Donor name, b. Name of security, c. Number of units/shares, d. Date of transfer, and, e. Donor's contact information.

If you have any questions or concerns regarding this request, I can be reached at (telephone or e-mail address). Thank you for your prompt attention to and assistance with this matter.

Sincerely yours,  
Name of Donor