

Instructions: Complete and send this form to Jeanne Sallade at Penn State via FAX 814-865-0893 or mail at the address below; or e-mail the requested information to Jeanne Sallade at jms1006@psu.edu.

**The Pennsylvania State University
Office of Gift Planning
212 The 103 Building
University Park, PA 16802**

ATTENTION: Jeanne M. Sallade

This is to inform you that I have requested a distribution to The Pennsylvania State University from my Individual Retirement Account as described below.

IRA Plan Trustee/Administrator Name: _____
(Traditional or Roth IRA)

Account Number: _____
(include last 4 digits only)

Distribution Amount: \$ _____

I understand I cannot receive any goods, services or benefits (such as Nittany Lion Club priority points or membership benefits of any kind) from the University in exchange for a qualified charitable distribution from my IRA. When received, this gift should be allocated or used by the University for _____

It is my intention that this gift comply with the "qualified charitable distribution" requirements of Section 408(d)(8) of the Internal Revenue Code, as amended. Accordingly, when payment is received from my trustee/administrator, please send me a contemporaneous written acknowledgement that includes the amount of my gift, states that no goods, services or benefits were transferred to me in consideration for this gift, and indicates that my gift will not be placed in a donor advised fund or supporting organization.

Please contact me should you have any questions. Sincerely,

Donor's Signature: _____
Signature Date

Printed Name: _____

Address: _____

Daytime Phone: _____ E-mail: _____

This form is provided for use in making a gift to Penn State. It is not intended as legal or tax advice and is not a request or recommendation to make a distribution from your IRA.