



OSU FOUNDATION | OFFICE OF GIFT PLANNING

GIVING FROM YOUR IRA

Charitable Options | Now

Qualified Charitable Distribution; (QCD) refers to a direct gift from your IRA to a qualified charity.

- Must be 70½ or older
- Must be from an IRA (rollover from a 401k, 403b or other qualified account to IRA before making the gift)
- Distribution is initiated by you, through your IRA administrator, directly to the OSU Foundation
- Maximum amount to gift is \$100,000 in a tax year per tax payer
- Tax neutral (Not counted as income/not counted as a charitable contribution)
- A QCD can count toward your annual Required Minimum Distribution (RMD) if you are 72 or older

Charitable Options | Later

Beneficiary designation of IRA, 401(k), 403b or other accounts.

Change the retirement plan beneficiary page to include:

Oklahoma State University Foundation

OSUF Tax ID number - Tax ID #73-6097060

Provide the % that is to go to OSUF

Special Note

Charitable gifts of retirement plan assets at death can provide some of the greatest tax benefits available. Why? Because many retirement plan assets produce taxable income to your heirs, while other assets have no income tax consequences to heirs. The good news is that careful planning can actually increase the amount of property left to heirs.

Office of Gift Planning

The OSU Foundation has a dedicated team trained in estate planning who are able to help people unite their passions with university priorities to create a meaningful legacy. Contact us today to learn more about how we can help you achieve your dreams. *Virtual meetings are available!*

[OSUgiving.com/EstatePlanning](https://osugiving.com/EstatePlanning) | giftplanning@osugiving.com

Information for Professional Advisors

Beneficiary Name: The Oklahoma State University Foundation, an Oklahoma not-for-profit corporation having offices at Stillwater, Oklahoma, or its successor organization.

Purpose (Optional): Funds distributed from my Retirement Account(s) shall be used for _____.

If this gift is for the creation of an endowment, then the terms of endowment should be set forth in a separate endowment agreement, to be referenced by the beneficiary designation form.

Tax ID Number: 73-6097060

Mailing Address: 400 S. Monroe Stillwater, OK 74074

Phone: 800.622.4678

As with any decision involving your assets, we urge you to seek the advice of your professional advisers when considering a gift to Oklahoma State University Foundation.



400 South Monroe | Stillwater, OK 74074 | 800-622-4678 | OSUgiving.com | giftplanning@OSUgiving.com

uniting donor and university passions and priorities to achieve excellence