

AT THE UNIVERSITY OF AKRON,

# WE RISE TOGETHER

## YOU CAN USE YOUR IRA TO HELP UA STUDENTS RISE TO THEIR HIGHEST POTENTIAL

If you have an IRA and are 70 ½ or older, you can donate tax-free from your IRA to The University of Akron Foundation, using a qualified charitable distribution (QCD), also known as an IRA charitable rollover. A QCD can satisfy part or all of your required minimum distribution (RMD), reducing your taxable income while making a meaningful impact on UA students.

### HOW IT WORKS

You simply reach out to your IRA plan administrator or account custodian using our IRA Contribution Transfer Form and direct them to make a gift from your IRA to The University of Akron Foundation. Directly transferred from your IRA, your funds will help continue our work to raise the University to new heights.

To benefit this year, make your QCD gift before Dec. 31. Contact The Center for Gift and Estate Planning to learn more or to notify us of your gift so that we can direct it in accordance with your wishes for a specific purpose, such as The Association of The University of Akron Retirees Scholarship.



### Kimberly Zebedis

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The  
University  
of Akron

WE RISE  
TOGETHER  
The Campaign for  
The University of Akron

**We lift our people. We elevate this place. We live up to our promises.**

Information shared by the Center for Gift and Estate Planning does not constitute legal or tax advice and should not be relied upon as such. Consult with your professional advisors to determine the legal and tax consequences of all planned giving decisions.

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The University of Akron Foundation  
**Center for Gift and Estate Planning**

**TO:** **TRUSTEE/CUSTODIAN OF MY IRA**

**FROM:**

\_\_\_\_\_  
Name

\_\_\_\_\_  
IRA Account Number

\_\_\_\_\_  
Address

**RE:** Qualified Charitable Distribution

This letter serves as my request to make a qualified charitable distribution from my IRA to The University of Akron Foundation.

Please transfer \$\_\_\_\_\_ directly from the above referenced IRA to The University of Akron Foundation (Federal Tax ID: 34-6575496) at the following address:

Center for Gift and Estate Planning  
The University of Akron Foundation  
Akron, OH 44325-2603

My distribution is to be used for The Association of The University of Akron Retirees Scholarship.

**In your correspondence with The University of Akron Foundation, please reference my name and address as the donor of record in connection with this transfer.**

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

- IRA account holder must be at least 70½ at the time the distribution is made to charity;
- Gifts to all charities combined cannot exceed \$100,000 per donor per year; and
- Gifts must be made directly from the IRA custodian to an eligible charity;
- Goods and services cannot be received by the donor in exchange for the IRA gift.

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The University of Akron

**QUESTIONS:**

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