

IRA TAX-FREE ROLLOVER INSTRUCTIONS

A qualified charitable distribution is money that individuals who are age 72 or older may direct from their traditional IRA to eligible charitable organizations free of any tax. The provision has a cap of \$100,000 per individual for charitable distributions from individual IRAs each year.

1. Be sure to leave time before the end of the tax year to complete the gift.
2. If your qualified retirement assets are in a defined contribution plan other than an IRA, you must first roll your plan (or at least the amount you wish to give) into an IRA to qualify for the rollover to Calumet College of St. Joseph. This step is easy and can be accomplished by contacting your retirement plan administrator, but it does require additional time to complete.
3. Once the assets you wish to give are in an IRA, contact your plan administrator in writing, requesting a transfer from the IRA to the College.

Your request should note:

- Your plan account number
 - The amount you wish to transfer
 - The name: **Calumet College of St. Joseph**
 - CCSJ's Federal Tax ID number: **35-1087173**
 - A statement specifying that you want the gift sent to the attention of Ester Diaz (see contact information below).
 - Ask the plan administrator to identify you as the IRA owner when the transfer is made.
4. Have the check made payable to **Calumet College of St. Joseph** directly, and not to you.

Please consult your professional advisor for specific advice regarding this transaction.



For additional information regarding gifting to CCSJ, please contact:

Ester Diaz
Director of Institutional Advancement
ediaz@ccsj.edu
219.473.4388

Calumet College of St. Joseph
2400 New York Avenue
Whiting, IN 46394

SECURITIES TRANSFER INFORMATION

The following information will help your broker initiate the electronic transfer of your gift to Calumet College of St. Joseph.

Account Name: Calumet College of St. Joseph
CCSJ Federal ID: 35-1087173
Brokerage Firm: First Merchants Investment Services
Account Number: 2US15418
DTC # (digital transfer): 0701

Please provide Calumet College of St. Joseph with the information listed below to assist in processing your gift.

- Name of stock owner
- Name of stock being transferred
- Number of shares being transferred
- Anticipated date of transfer

CCSJ Broker

Liam Garvey
First Merchants Investment Services
707 Ridge Road
Munster, IN 46321
lgarvey@firstmerchants.com
219.227.3035

CCSJ Director of Institutional Advancement

Ester Diaz
Calumet College of St. Joseph
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Thank you for your support!

We appreciate your interest in a stock transfer to Calumet College of St. Joseph.