



**Instructions to roll-over an IRA distribution to the
Medical University of South Carolina**

- 1. Contact your IRA Custodian to request forms and instructions to roll-over your distribution to the Medical University of South Carolina.** *Not to the Medical University of South Carolina Foundation.*
- 2. Submit the IRA request forms to your custodian.** Recent legislation allows you to make 2013 qualified charitable distribution (QCD) gifts prior to January 1, 2014.
- 3. If needed, complete and submit the IRA Roll-over letter provided by MUSC.**
(See Page 2)
- 4. Notify MUSC's Office of Gift Planning at 800-810-6872 or 843-792-2236 or in writing.**
Include the following:

Name of your IRA custodian

The gift amount

How the gift is to be designated *(as detailed as possible) (i.e. name of fund)*

Your contact information *(address, phone, email, etc.)*

C. McLaurin Bruce
Gift Planning Administrator
MUSC, Office of Gift Planning
261 Calhoun Street, MSC 182
Charleston, SC 29425-1820
brucem@musc.edu

Phones: 800-810-6872 or 843-792-5252
FAX: 843-792-7980

Date

IRA Custodian Company Name

Address

City, State, Zip

Dear IRA Custodian,

Please accept this letter as my request to make a direct qualified charitable distribution in the amount of \$_____ from my Individual Retirement Account # _____ [account number] as provided by Sec. 208 of the American Taxpayer Relief Act of 2012 (ATRA). Provisions allow for **2012** qualified charitable distributions to be made prior to **February 1, 2013** and **2013** qualified charitable distributions to be made prior to **January 1, 2014**.

Distributions should be mailed and made payable to:

Medical University of South Carolina

Attn: Office of Gift Planning

261 Calhoun Street, MSC 182

Charleston, SC 29425

Treasury Tax ID Number is #57-6000722.

My contact at the Medical University of South Carolina is Ms. McLaurin Bruce, Gift Planning Administrator, who can be reached by calling (843) 792-5252 or toll-free (800) 810-6872, or by e-mail at brucem@musc.edu.

In your transmittal to MUSC, please include my name and address as the donor of record and indicate the transfer is being made from my IRA account. Please copy me on your transmittal.

If you have any questions or need further documentation, I can be reached at _____ [telephone #].

Thank you for your assistance in this matter.

Cordially yours,

IRA Owner (Your Signature)

IRA Owner (Printed Name)

Phone Number