

LONG BEACH

STATE UNIVERSITY

Gift Planning

562-985-5489 • giftplanning@csulb.edu

A California State University Campus

HOW TO REQUEST YOUR IRA CHARITABLE ROLLOVER

Under the Protecting Americans from Tax Hikes Act (PATH) of 2015, effective December 18, 2015, when you are 70 ½ or older, you may request that a contribution is made directly from your Individual Retirement Account (IRA) to Long Beach State University. You may give as much as \$100,000 maximum each year. To assure the tax benefit, the payment should go directly from your IRA custodian to the campus.

The information you will need to complete the rollover is below. Wire transfer instructions are available upon request. Please call us for the information.

All contributions made to the **CSULB 49er Foundation, Tax ID number: 45-2163910**. Please fill out and return the IRA Contribution Notification Form to designate the use of your gift.

Payment by Check:

Payable to: CSULB 49er Foundation
Mail to: Gift Processing Department
6300 State University Drive, Suite 332
Long Beach, CA 90815

For assistance, please contact the Gift Planning Office at (562) 985-5489 or the Gift Processing Department at (562) 985-8491.