

CHARITABLE IRA ROLLOVERS

PROVIDE A LASTING LEGACY

As of December 2015, the IRA charitable rollover is a permanent law, permitting qualifying donors to make gifts from their retirement accounts without being subject to federal income tax on these withdrawals.



Instruct your plan administrator



Gift made directly to Columbia



Plan administrator makes transfer



How to Give

For donors age 70 1/2 or older, instruct your IRA administrator to transfer funds directly to Columbia Business School. You may give up to \$100,000 total per tax year in combined charitable IRA rollover gifts.

Benefits to You

You may avoid having mandatory annual distributions from your IRA account count as income subject to taxation when you make your gift directly to Columbia.

Use Your Assets Now

An IRA rollover may be right if your retirement account constitutes the largest share of your available assets or if you are required to take a minimum distribution from your IRA and do not need additional current income.

Interested in learning more about making a planned gift?

Contact Zachary Howell, Assistant Dean, at 212-851-4301 or zh2134@gsb.columbia.edu.

Columbia University welcomes alumni and friends into its 1754 Society, an honorary society for those who have made planned gifts to Columbia. On behalf of all past, present, and future Columbians, thank you for your enduring commitment.
Please tell us more about your planned gift below.

- I have provided support for Columbia Business School in my will or via other planned gift.

NAME

SCHOOL / CLASS

DATE OF BIRTH

ADDRESS

CITY / STATE / ZIP

PHONE

EMAIL

PLEASE CHECK ONE:

- Columbia may include my name in 1754 Society member listings.

Please list my name as:

- I prefer to remain anonymous.

OPTIONAL INFORMATION:

Please tell us more about your gift to Columbia.

I have named Columbia Business School a beneficiary in my:

- Will or living trust
 Charitable trust
 IRA or other retirement plan
 Life insurance policy
 Other (please specify):

My gift is:

- Unrestricted
 Designated for _____

Estimated current value: _____

SIGNATURE

DATE

This information will be kept confidential and is not binding on you or your estate.

PLEASE RETURN COMPLETED FORMS TO:

Columbia Business School
Office of External Relations and Development
33 West 60th Street, 7th Floor, New York, NY 10023