

**IRA GIFT INSTRUCTIONS  
YALE UNIVERSITY**

DATE: \_\_\_\_\_

TO: \_\_\_\_\_  
(Name of IRA Account Administrator)

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

Please accept this letter as my request to make a qualified charitable distribution from my Individual Retirement Account # \_\_\_\_\_.

Please transfer funds, or issue a check in the amount of \$\_\_\_\_\_ payable to Yale University.

Please transfer the following securities to Yale University:

\_\_\_\_\_

**In your transmittal to Yale, 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.**

**It is important to notify Yale's Office of Donated Securities at [donated.securities@yale.edu](mailto:donated.securities@yale.edu) or (203) 432-4107.**

**Listed below are the following DTC instructions if transferring securities:**

The Northern Trust Company  
Trust Department  
DTC No. 2669  
Reference: 26-12780, Yale University Donated Securities Account  
Donor Name:

**Listed below are the instructions for cash transfers:**

Bank Name: Bank of America, New York, NY  
Account Title: Yale University Development  
ACH (EFT)  
ABA Number: 011900254  
Account Number: 9428411880

*Domestic Wire Transfer:*  
ABA Number: 026009593  
Account Number: 9428411880

*International Wire Transfer:*  
SWIFT Code: BOFAUS3N  
Account Number: 9428411880

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**Yale's tax identification number (EIN) is 06-0646973.**

**If sending the donation by mail please forward to:**

Yale University  
Office of Development – Contribution Processing  
P.O. Box 805  
New Haven, CT 06503-0805

If you have any questions or need to contact me, I can be reached at the following phone number: \_\_\_\_\_.

Thank you for your assistance with this matter.

Sincerely,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Please print name)

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**DONOR INSTRUCTIONS**

To be able to anticipate receipt of your gift and designate it to the purpose you choose, please send a copy of this form to:

Yale University  
Office of Planned Giving  
P.O. Box 2038  
New Haven, CT 06521-2038

Phone: (800) 445-6086

Email: [development.plannedgiving@yale.edu](mailto:development.plannedgiving@yale.edu)

I intend my gift to be for the following purpose: \_\_\_\_\_ Alumni Fund  
\_\_\_\_\_ Other

(If other, please specify purpose: \_\_\_\_\_)

Thank you.