



The University of Texas at Austin

IRA Qualified Charitable Distributions (QCDs) Instructions for Donors and IRA Administrators

The University appreciates your IRA gift and provides the following instructions to facilitate the distribution and receipt of your contribution. Please share these instructions with your IRA administrator / custodian.

Before mid-December, contact your IRA custodian and request a distribution to The University. If you plan for your gift to qualify for the IRA/QCD exclusion, the distribution should be postmarked no later than December 31, 2025.

- The effective date of a checkbook IRA gift is the date the check clears the donor's IRA custodian account, not when received or cashed by UT-Austin or when postmarked. Therefore, gifts by IRA checkbook intended to qualify as a QCD should be initiated no later than the first week of December. Please write "QCD" in the memo line.
- Ask your IRA custodian to include your name on the **check made payable to "The University of Texas at Austin"** and send it to:

University Development Office - Gift Planning
The University of Texas at Austin
1 University Station, Mail Stop A3000
Austin, Texas 78712

UT Austin Tax Identification Number: **74-6000203**

To help UT process and acknowledge your gift, please notify the Gift Planning Office at (512) 475-9632 / giftplan@austin.utexas.edu and provide:

- Donor's name, address, phone, and email address
- IRA administrator/custodian – company and contact
- Expected date and amount of IRA distribution/gift
- Gift Designation(s) – department, endowment name, program, etc.

If your IRA custodian prefers to send your distribution via **Wire Transfer**:

Frost National Bank	Routing/ABA #: 114000093
	Account #: 591293028
Account Name:	University of Texas at Austin (include donor name and gift designation in wire memo)

Including the University as a beneficiary of your tax-heavy IRA is one of the most tax-efficient ways to fund a charitable gift from your estate. An IRA beneficiary designation for the University may reduce or eliminate estate and income taxes related to your retirement accounts. To learn more about making the University a beneficiary of your IRA, contact us at (512) 475-9632 / giftplan@austin.utexas.edu.

As with any decision involving your assets, the University urges you to seek the advice of professional counsel when considering a gift to The University of Texas at Austin.