\_\_\_\_\_\_\_\_ , 202\_

Custody Agent (I.e. Vanguard, Fidelity…)

Address

**RE: Request for Charitable Distribution from Individual Retirement Account**

**# \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in the name of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as provided by The Trade Facilitation and Trade Enforcement Act of 2015.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (not to exceed $100,000) payable to “The Phi Delta Theta Foundation” and mail it directly to the following address:

Phi Delta Theta Foundation

2 South Campus Ave

Oxford, OH 45056

In your transmittal to Phi Delta Theta Foundation, please give my name and address as the donor of record in connection with this transfer. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 202\_ tax year.

If you have any questions, or need to contact me, I can be reached at: (\_\_ ) \_\_\_-\_\_\_\_.

Thank you for your assistance in this matter.

Sincerely,

*Plan Owner Name*

*Plan Owners Address*