

# ***Thank you!***

***A gift from your Individual Retirement Account will help the Phantom Regiment provide life-changing experiences through performing arts and education.***

The attached letters will help you make a transfer directly from your IRA.

**Page 1. “From Plan Owner to IRA Administrator”**

Please complete the underlined portions of the attached letter and send it to your IRA Plan Administrator to initiate the transfer.

**Page 2. “From Donor to the Phantom Regiment”**

Upon initiating the transfer, please complete the underlined portions from the attached letter and send to:

**Phantom Regiment  
Attn: Lori Valenzuela  
420 Main Street  
Rockford, IL 61103  
Email: [lori@regiment.org](mailto:lori@regiment.org)**

For assistance please contact Lori Valenzuela at [lori@regiment.org](mailto:lori@regiment.org) or 815 261-1956.

*The Phantom Regiment does not provide tax advice. All decisions regarding the tax implications of your investments should be made in connection with your tax and legal advisors.*

*The Phantom Regiment is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code.*

**FROM PLAN OWNER TO IRA ADMINISTRATOR**

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**Date**

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**IRA Plan Administrator**

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**Address**

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**City, State, Zip**

RE: Request for Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ pursuant Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended. I am 70 ½ years old or older. Please wire or issue a check in the amount of \$ \_\_\_\_\_ payable to:

**Phantom Regiment  
Attn: Lori Valenzuela  
420 Main Street  
Rockford, IL 61103**

In your communication to the Phantom Regiment, please include my name and address as listed below as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have questions, please contact Lori Valenzuela at 815 261-1956. Thank you for your assistance in this matter.

Sincerely,

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**Plan Owner Name**

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**Address**

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**City, State, Zip**

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**Telephone Number**

**FROM DONOR TO THE PHANTOM REGIMENT**

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**Date**

**Phantom Regiment  
Attn: Lori Valenzuela  
420 Main Street  
Rockford, IL 61103  
Email: lori@regimnet.org**

Dear Mrs. Valenzuela:

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to the Phantom Regiment in the amount of \$ \_\_\_\_\_ from my plan trustee/administrator:

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**IRA Plan Administrator**

It is my intent to comply with Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift. Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization, nor will it fund a life income agreement.

Sincerely,

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**Plan Owner Name**

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**Address**

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**City, State, Zip**

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**Telephone Number**

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**Email Address**