

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
Email: prinfo@regiment.org

For assistance please contact the Phantom Regiment office at prinfo@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

Date

IRA Plan Administrator

Address

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 72 years old or older. Please wire or issue a check in the amount of \$ _____ payable to:

**Phantom Regiment
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 the Phantom Regiment office at prinfo@regiment.org or 815 261-1956. Thank you for your assistance in this matter.

Sincerely,

Plan Owner Name

Address

City, State, Zip

Telephone Number

Date

Phantom Regiment

Email: prinfo@regiment.org

Dear Phantom Regiment:

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:

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,

Plan Owner Name

Address

City, State, Zip

Telephone Number

Email Address