

Date: _____

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 # _____ as provided by Sec. 408(d)(8) of the Internal Revenue Code 1986, as amended.

Please issue a check in the amount of \$ _____ (not to exceed \$100,000) payable to "Tri Sigma Foundation" and mail it directly to the following address:

Tri Sigma Foundation
225 North Muhlenberg Street
Woodstock, VA 22664

In your transmittal to the Tri Sigma Foundation, please give my name and address as the donor of record in connection with this transfer, and indicate that the check is for the benefit of _____ [e.g. Ever Forward Fund- Greatest Need, scholarship, Sigma Serves Children]. Please copy me on your transmittal.

It is my intention to have this transfer qualify for exclusion with respect to the 2021 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 Owner Address:

*For custodian use only: For wire transfer information, please contact
Tri Sigma Foundation's Director of Finance,
Mary Keleher at mkeleher@trisigma.org or 317-902-9774.*