



Brothers attending the  
ZBT International Convention



**ZETA BETA TAU**  
FOUNDATION

**A tax-free gift from your IRA**

Don't overlook this smart planning option in 2019

## Good news for IRA owners age 70½ or over

A transfer directly from your IRA to Zeta Beta Tau Foundation (often called a qualified charitable distribution or IRA charitable rollover) is a simple and highly effective way to give. If you're age 70½ or over, it's a great way to minimize the tax bite associated with IRA required minimum distributions.

- Instruct your IRA custodian to make a transfer **directly** to Zeta Beta Tau Foundation (contact us for helpful transfer information).
- Although there is no tax deduction, the amount transferred counts toward your required minimum distribution and is excluded from your income for federal tax purposes—*no tax is due!*
- Transfers up to a total of \$100,000 qualify for this favorable tax treatment each year.
- Your gift makes an immediate impact—there is no need to wait until the end of the year!

Be sure to consult your tax, financial, and legal advisors when considering any planned gift.

### Questions? Contact us!

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[zbtfoundation.org/plannedgiving](https://zbtfoundation.org/plannedgiving)



### How much is your RMD?

Use our calculator at [zbt.irarollover.info](https://zbt.irarollover.info) to estimate your 2019 required minimum distribution, and please let us know if you are planning a gift from your IRA. We'll be happy to help you explore the many ways you can make an impact on the scholarship and leadership initiatives of Zeta Beta Tau Foundation.



## **Consider using your IRA to support Zeta Beta Tau**

- Please tell me more about making a gift from my IRA.
- I am planning to direct an IRA distribution to Zeta Beta Tau Foundation.
- I am interested in learning about other ways to support Zeta Beta Tau.
- I have included Zeta Beta Tau Foundation in my estate planning.
- I would like to know more about including ZBT in my estate planning. Please send information about the *City of Light Trust*—the society that recognizes those who have planned deferred gifts to support Zeta Beta Tau Foundation.

Name \_\_\_\_\_

Phone number \_\_\_\_\_

Email \_\_\_\_\_

Please tear at the perforation, fold this panel to the inside and tape securely closed.

Zeta Beta Tau Foundation  
3905 Vincennes Road, Suite 100  
Indianapolis, IN 46268



Bernard (Buddy) E. Weissman, Ph.D., Xi (Massachusetts Institute of Technology) 1975 and Jon K Hirschtick, Xi (Massachusetts Institute of Technology) 1983



PLACE  
STAMP  
HERE

ZETA BETA TAU FOUNDATION  
3905 VINCENNES RD STE 100  
INDIANAPOLIS IN 46268-3000

