

# Ordinary steps. Extraordinary impact.

Year-end options  
for supporting  
Zeta Beta Tau Foundation.



**ZETA BETA TAU**  
FOUNDATION



Brother Bret W. Hrbek, Delta Xi (Virginia Tech) 1996, Brother Devon M. Schad, Beta Alpha Theta (University of Colorado Boulder) 2004, Brother Yoaav S. Krauthammer, Lambda (Case Western Reserve University) 2003

## Take steps in 2021. Make an impact for years to come.

As you consider charitable giving priorities for the remainder of 2021, we invite you to explore gift options that can be personally rewarding and tax smart. Your gift is an investment in *brotherhood for a lifetime* and a vote of confidence in our work, and we are extremely grateful for your support.

### Opportunity to consider

Enjoy a charitable income tax deduction even if you do not itemize your return.

### Step you can take

- In 2021, taxpayers who do not itemize their returns are eligible for a \$300 federal income tax deduction for cash gifts to qualified charities (\$600 for married couples filing jointly).

Make an impact at Zeta Beta Tau plus get a double tax benefit.

- Donate appreciated stock you have held over one year. The gift qualifies for a tax deduction if you itemize, and no capital gains tax is due on the appreciation.

Give from your IRA (age 70½ or over).

- Make a direct transfer to Zeta Beta Tau Foundation from your IRA. No tax is due and the transfer counts toward your RMD (subject to limitations).

Support us using funds you have already designated for charity.

- Make a grant to Zeta Beta Tau Foundation from your donor-advised fund.

### Please get in touch!

We can answer questions and send our complimentary brochure, *10 Strategies for Year End 2021*.



Faron A. Lewitt  
Chief Executive Officer  
Zeta Beta Tau Foundation  
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flewitt@zbtfoundation.org

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

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



**Take the next step! Learn more about ways to make an impact.**

- Please send information about gifts of appreciated stock.
- Tell me more about making a gift from my IRA (age 70½ or over).
- I have a donor-advised fund and am considering a grant to Zeta Beta Tau Foundation.
- I have included Zeta Beta Tau Foundation in my will and estate planning.
- I would like to know more about ways to include ZBT in my will and estate planning.

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

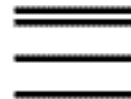
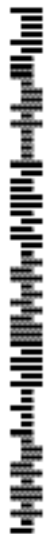


Brother Myles K. Beck, Omega (University of Missouri) 1967 and Brother Jerry N. Katz, Alpha Rho (University of California - Los Angeles) 1967

## Gift to our Fund for ZBT

One meaningful way to impact the scholarship, leadership and heritage initiatives of the Zeta Beta Tau Foundation for years to come is to make a gift to our **Fund for ZBT**. We use the Fund for ZBT to meet our priority needs. Your gift, combined with others, sustains our support of Zeta Beta Tau brothers year after year.

ZETA BETA TAU FOUNDATION  
3905 VINCENNES RD STE 100  
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STAMP  
HERE