



PHILLIPS ACADEMY IRA ROLLOVER REQUEST TO PLAN ADMINISTRATOR

Date:

Dear: (IRA Custodian Firm, Contact and Address)

Please accept this letter as my request to make a 2018 qualified charitable distribution from my individual retirement account (insert account number here) # _____.

Please issue the distribution in the amount of \$ _____ payable to Trustees of Phillips Academy, postmarked or wire transferred by December 31, 2018.

Distribution by <u>CHECK</u>	OR	Distribution by <u>WIRE TRANSFER</u>
MAIL TO: Phillips Academy Attn: Grace E. Curley '81, P'20 Director of Gift Planning Office of Academy Resources 180 Main Street Andover, MA 01810		Receiving Bank Name: Bank of America Receiving Bank ABA #: 026009593 Receiving Bank SWIFT CODE: BOFAUS3N Receiving Bank CHIP Participant #: 0959 Beneficiary Account #: 000011116221 (use all 12 digits) Beneficiary Account Name: Trustees of Phillips Academy Beneficiary Contact: Mei Jiang, tel. 978-749-4514

In your transmittal to Phillips Academy, please indicate my name as the IRA owner of record in connection with this transfer. Before initiating the distribution, please notify either Grace E. Curley '81, P'20, Director of Gift Planning, at 978-749-4281 or Connie Pawelczak, Associate Director of Gift Planning, at 978-749-4529.

For your reference, Phillips Academy's tax identification number (EIN) is 04-210-3579.

Also, please copy me on the transmittal and should you have any further questions, please contact me at:

Sincerely,

(Signature)

Donor (Please print name)

Phillips Academy, please designate my gift as follows:
