



**LETOURNEAU  
UNIVERSITY**

**THE  
LETOURNEAU UNIVERSITY  
FOUNDATION**

## Securities Transfers to LeTourneau University

Thank you for your interest in making a gift to LeTourneau University in the form of a security or via a distribution from your IRA. To assure the tax deductibility of your gift, it is important that the distribution be made to LeTourneau University through, in the case of securities, our authorized Broker / Representative as specified below, or in the instance of IRA distributions directly from your Broker as specified below.

With respect to IRA's, note that while required minimum distributions (or "RMD's") are now not required until you reach age 72, tax-free distributions (known as Qualified Charitable Distributions, or "QCD's") can still begin at age 70½. Most importantly, QCD's are considered a non-taxable / non-income\* event to the IRS – and can be exercised in amounts of up to \$100,000 per year, per individual. Note that SEP, SIMPLE, and ROTH IRA's (if they are still active with your employer and receiving contributions), do not count under the IRS's QCD rules.

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**To make a distribution from your IRA**, the check or draft must come from your Broker, and be made out to LeTourneau University (not first accessed by you and then sent by you from your personal bank account). Those gifts can be sent directly to PO Box 7333, Longview, TX 75607. Please add a notation if there is a specific purpose you have in mind for that gift.

Contact us with any questions at 1-800-259-5388, or via email at [administrative@letufoundation.org](mailto:administrative@letufoundation.org).

**For gifts of securities (stocks, bonds, and related)**, these should be transferred by your Broker, unsold (as an "in-kind transfer") to the Foundation's Broker as noted below. The Foundation will ensure their prompt liquidation and will then transfer the realized gift to the University. Instructions to assist you in making your gift of this type are as follows:

- ❖ **Host Firm Name:** Merrill Lynch
- ❖ **DTC Number:** 8862
- ❖ **Account Number:** 549-03052
- ❖ **Account Name:** THE LETOURNEAU UNIVERSITY FOUNDATION  
(FOR THE BENEFIT OF LETOURNEAU UNIVERSITY - EIN: 75-1081109)

**For questions or assistance with your transfer, please feel free to contact:**

Merrill Lynch Wealth Management 6751 Old Jacksonville Hwy. Tyler, TX 75703  
Maureen Troiano, 903-535-4726 or [maureen.l.troiano@ml.com](mailto:maureen.l.troiano@ml.com)

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Thank you again, and God bless you for the way in which this will bless our students and demonstrate your "obedience to your confession" of our Lord Jesus Christ. (2 Cor. 9:13)

*\*Always Consult your tax advisor for the actual tax treatment of your gift in your unique situation.*