

## IRA QUALIFIED CHARITABLE DISTRIBUTION (QCD) FORM

IRA QCDs or IRA Charitable Rollovers, as they are sometimes called, are an increasingly popular way for donors 70 ½ or older to support STLE's efforts to attract young talent to the tribology and lubrication engineering field through its **NextGen Fund**. You can make up to \$100,000 in tax-free charitable distributions annually, lowering your taxable income, and, if you're age 72 or older, helping you to meet your minimum distribution requirement or RMD.

### Donor Information:

Donor's signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Printed Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
IRA gift amount: \$ \_\_\_\_\_  
Name of IRA financial institution: \_\_\_\_\_

To initiate a qualified charitable distribution from your IRA to the STLE NextGen Fund, your IRA trustee will need the following information:

Legal Name: **Society of Tribologists and Lubrication Engineers**  
Taxpayer ID: **36-2041016**  
Permanent Address: **840 Busse Highway**  
**Park Ridge, IL 60068**

***The Society of Tribologists and Lubrication Engineers (STLE) is a 501(c)(3) nonprofit organization.***

It is my intention that this charitable rollover gift comply with the IRS Qualified Charitable Distribution requirements. Accordingly, when the Society of Tribologists and Lubrication Engineers receives the QCD gift from my financial institution, it will provide me with a written acknowledgement of the gift date and amount, stating no goods or services were transferred to me in consideration for the gift.

In your transmittal to the Society of Tribologists and Lubrication Engineers, please indicate my name and address as the donor of record and copy me on your correspondence in connection with this transfer. It is my intention to have this transfer qualify for exclusion during this tax year. If there's any additional information required to complete this transfer, please contact STLE.

**Please print, sign and mail this form to your IRA trustee and instruct them to send the form and your IRA charitable rollover gift to:**

Society of Tribologists and Lubrication Engineers  
**Attn: STLE NextGen Fund**  
840 Busse Highway, Park Ridge, IL 60068

**Questions?** Contact Karl Phipps at (847) 825-5536 or [kphipps@stle.org](mailto:kphipps@stle.org)