

# Instructions For Giving Stock And Mutual Funds

Use the following Letter of Authorization (LOA) to contribute publicly traded securities such as stock and mutual funds and cash through your brokerage account. All contributions to the charity's fund are irrevocable and are in most cases eligible for a tax deduction.\*

The Letter of Authorization (LOA) on the following page is for your convenience. Please contact your financial institution to request their required procedures and forms and to provide them with the delivery instructions found below.

**Please note that if you are sending physical stock certificates or stock held at a transfer agent, complete our Stock Certificate or Transfer Agent Gifting Form available on our website.**

If we may serve you in any way, please contact using one of the options provided at the bottom of this page.

\*Individual circumstances vary. Please consult your tax advisor regarding your specific situations. Gifts from other tax exempt organizations are not deductible.

## STEP 1: INITIATE THE TRANSFER WITH YOUR BROKER

To transfer stocks or mutual funds that are being held electronically, please use the Letter of Authorization on the following page and instructions below. Include the giver's name and the charity's fund number on all deliveries.

### Deliver All DTC Eligible Securities to

DTC Clearing 0226,  
National Financial Services, LLC  
For the account of National Christian Charitable  
Foundation Inc.  
Account Number 479-048720

### Other Securities: Mutual Funds and other securities

may be delivered to one of the following accounts  
Fidelity .....Acct# 479-048720  
Schwab .....Acct# 6595-8708  
Merrill Lynch.....Acct# 210-04116  
TD Ameritrade .....Acct# 901694820

Note: Some financial institutions and mutual fund companies require the use of their own form or an additional letter of instruction. If your mutual funds are held at a brokerage firm other than the ones listed, please check with your broker to see if the funds are transferable. If they are not transferable, please contact us.

## STEP 2: NOTIFY NCF ABOUT YOUR TRANSFER

Please send a copy of your Letter of Authorization to:

### MAIL or OVERNIGHT DELIVERY

National Christian Foundation  
ATTN: Contribution Services  
11625 Rainwater Drive, Suite 500  
Alpharetta, GA 30009

### Email

chicago@ncfgiving.com  
please note: email transmissions are  
not secure

### Fax

847.557.1398

Note: If we do not receive proper notification of a gift, the gift will be placed into a suspense account. If the gift remains unidentified despite NCF's good faith efforts, the gift will be placed into the general fund for NCF.

## STEP 3: CONFIRM YOUR TRANSFER

Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your gift has been transferred from your account to NCF's account. Once received, it usually takes 3-5 business days for your transfer to be liquidated, settled, and completely posted to the charity's fund.

**PHONE** 847.607.9569 **FAX** 847.557.1398 **EMAIL** [chicago@ncfgiving.com](mailto:chicago@ncfgiving.com) **WEB** [ncfgiving.com](http://ncfgiving.com)

## LETTER OF AUTHORIZATION

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. I understand that I must initiate this transfer with my broker. My intention is to gift these stocks to National Christian Charitable Foundation, Inc. If you have any questions, or if there is a problem with this transfer, please contact me immediately at the phone number below. This gift is being contributed by the following individuals / entities:

Contributor Name(s)

Address

Phone Number and Email Address

Name of Delivering Broker, Address, and Phone Number

Anticipated Date of Transfer

My Brokerage Account Number

#3450996

The 222 Foundation Single Charity Fund

NCF Giving Fund Number

NCF Giving Fund Name

Please deliver these shares to the following broker:

- Via DTC # 0226 to National Financial Services Acct# 479-048720 for National Christian Charitable Foundation,  
 Fidelity ..... Acct# 479-048720                       Merrill Lynch ..... Acct# 210-04116  
 Schwab ..... Acct# 6595-8708                               TD Ameritrade ..... Acct# 901694820

Please irrevocably transfer the following assets:

- Cash Contribution: \$ \_\_\_\_\_  
 Stocks, mutual funds, or other publicly traded assets listed below:

Description of Assets/ Name of Security	Symbol	Exact Number of Shares***	Approximate \$ Value
Description of Assets/ Name of Security	Symbol	Exact Number of Shares***	Approximate \$ Value
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\*\*Please initiate the transfer based on the number of shares and not the dollar value since security values may fluctuate.

Shares are to be transferred in kind and are not to be liquidated.\*\*\*

Total: \_\_\_\_\_

## SIGNATURES

This is my written authorization to irrevocably transfer ownership of the assets specified in this form to National Christian Charitable Foundation, Inc. I understand that any contribution, once accepted by the Fund, represents an irrevocable contribution to National Christian Charitable Foundation and is not refundable to me for any reason.

Medallion Signature Guarantee Program Stamp Here  
(If required by your financial institution)

\_\_\_\_\_  
Giver 1: Full Name (Please Print)

\_\_\_\_\_  
Giver 1: Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Giver 2: Full Name (Please Print)

\_\_\_\_\_  
Giver 2: Signature

\_\_\_\_\_  
Date

PHONE 847.607.9569 FAX 847.557.1398 EMAIL [chicago@ncfgiving.com](mailto:chicago@ncfgiving.com) WEB [ncfgiving.com](http://ncfgiving.com)