

# Instructions for giving stocks and mutual funds

Use the following Letter of Intent (LOI) to inform National Christian Foundation (NCF) of your decision to make a contribution of publicly traded securities, such as stocks, mutual funds, and/or cash through your brokerage account. All contributions to your NCF Giving Fund (donor-advised fund) are irrevocable and are, in most cases, eligible for a tax deduction. 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 (ex. Computershare), you must complete our stock certificate or transfer agent gifting forms available at ncfgiving.com/forms.

Note: Individual circumstances vary. Please consult your tax advisor regarding your situation. 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, contact your financial institution and provide the information with the instructions below. Include the giver's name and NCF Giving Fund number in the memo/notes section of the transfer request on all deliveries.

We recommend in-house transfers if you have a Fidelity, Schwab, or Merrill Lynch account. Please deliver all Depository Trust Company (DTC) eligible securities to the account name – National Christian Charitable Foundation Inc. – using one of the brokerages listed below:

Fidelity	Acct# 479-048720 (DTC 0226)
Schwab	Acct# 6595-8708 (DTC 0164)
Merrill Lynch	Acct# 210-04116 (DTC 8862)

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

## STEP 2: NOTIFY NCF OF YOUR TRANSFER

Please complete the LOI on the second page of this document and send to NCF via email, mail, or fax. It can be printed, completed, and signed by hand, or you can type directly into the fields, sign via DocuSign, and save to your computer before sending.

Email*	Mail or overnight delivery	Fax
transfers@ncfgiving.com	National Christian Foundation	888.672.7302
*Email transmissions are not secure	ATTN: Contribution Services	
	1150 Sanctuary Pkwy, Suite 350	
	Alpharetta, GA 30009	

Note: If we do not receive proper notification of a contribution, the contribution will be placed into a suspense account. If the contribution remains unidentified despite NCF's good faith efforts to match it with your contributions, the contribution 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 contribution has been transferred from your account to NCF's account. Once received, it usually takes 4-7 business days for your transfer to be liquidated, settled, and completely posted to your NCF Giving Fund.

PHONE 866.580.4483 FAX 888.672.7302 EMAIL transfers@ncfgiving.com WEB ncfgiving.com

# **LETTER OF INTENT (LOI)**

Please accept this letter as my intention to irrevocably contribute these assets to the National Christian Charitable Foundation, Inc. I understand that I must initiate this transfer with my broker. 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 / trusts:

Giver account title (individual, joint, trust, corporate, LLC, or other)				Email address
Street address	Phone number			
Name of delivering b	roker, address, and phone nur		Anticipated date of transfer	
Giver account number	er with delivering firm (require	ed only if submitting to I	prokerage as transfer authorization)	
NCF Giving Fund nan	ne			NCF Giving Fund number
Please indicate th	ne brokerage account whi	ch will receive the tra	ansferred shares:	
☐ Fidelity (Nation	onal Financial Services)	- Acct #479-0487	20 (DTC 0226)	
Schwab and	Co – Acct #6595-8708	(DTC 0164)		
Merrill Lynch	- Acct #210-04116 (DT	C 8862)		
I/we irrevocably to	ransfer the following asse	ets:		
Cash contrib	utions: \$			
Stocks, mutu	ıal funds, or other public	cly traded assets lis	ted below:	
Symbol/Ticker	Security description		Exact number of shares*	Approximate \$ value
Symbol/Ticker	Security description		Exact number of shares*	Approximate \$ value
Symbol/Ticker	Security description		Exact number of shares*	Approximate \$ value
Symbol/Ticker	Security description		Exact number of shares*	Approximate \$ value
Symbol/Ticker	Security description		Exact number of shares*	Approximate \$ value
*Please initiate the transition and are not to be		f shares and not the doll	ar value since security values may fluctu	uate. Shares are to be transferred in
Total approximate	e \$ value:			
			s my written LOI to irrevocably	·
•			Foundation, Inc. I understand t	•
	donor-advised fund, rep fundable to me for any r		ble contribution to National Chr	istian Charitable Foundation,
Giver 1: Full name (p	olease print)		Giver 2: Full name (please print)	
			. ,	
Giver 1: Signature		Date	Giver 2: Signature	Date

PHONE 866.580.4483 FAX 888.672.7302 EMAIL transfers@ncfgiving.com WEB ncfgiving.com