

# STOCK AND MUTUAL FUND TRANSFER FORM

Use this form to contribute publicly traded securities such as stock and mutual funds and cash through your brokerage account. All contributions to your 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 and Transfer Agent Stock Assignment 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: REQUEST THE TRANSFER WITH YOUR BROKER

To **Transfer Assets**, please use the Letter of Authorization and instructions below. Include the giver's name and Giving 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: Donor Services  
11625 Rainwater Drive, Suite 500  
Alpharetta, GA 30009

### Email

transfers@nationalchristian.com  
please note: email transmissions are  
not secure

### Fax

888.672.7302

*Note: Unidentified gifts are placed into an endowment fund at 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 your Fund.

## LETTER OF AUTHORIZATION

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. 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 Account Number with your firm

Giving Fund Number

Giving Fund Name

Please deliver these shares to the following broker:

- |  |  |                 |  |
|--|--|-----------------|--|
| <input type="checkbox"/> Via DTC # 0226 to National Financial Services Acct# 479-048720 for National Christian Charitable Foundation, Inc. |  |                 |  |
| <input type="checkbox"/> Fidelity Acct# 479-048720   | <input type="checkbox"/> Merrill Lynch | Acct# 210-04116 |  |
| <input type="checkbox"/> Schwab Acct# 6595-8708  | <input type="checkbox"/> 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
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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.

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

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

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

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

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