

# 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 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 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 NCF 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 Email Fax

National Christian Foundation transfers@ncfgiving.com 888.672.7302

ATTN: Contribution Services please note: email transmissions are

11625 Rainwater Drive, Suite 500 not secure

Alpharetta, GA 30009

Note: If we do not receive proper notification of a gift, it will be placed into an Endowment Fund at NCF until identified.

#### 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. 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 Account Number with your firm		The Samaritan Women F	Gund
NCF Giving Fund Number		NCF Giving Fund Name	
Please deliver these shares to the following  Via DTC # 0226 to National Financia  Fidelity Acct# 479-048720  Schwab Acct# 6595-8708  Please irrevocably transfer the following ass  Cash Contribution: \$  Stocks, mutual funds, or other publi	al Services Acct‡	☐ TD Ameritrade Acct# 90	10-04116
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
Description of Assets/ Name of Security	Symbol	Exact Number of Shares***	Approximate \$ Value
***Please initiate the transfer based on the Shares are to be transferred in kind and are			
SIGNATURES			
This is my written authorization to irrevocab Charitable Foundation, Inc. I understand the tribution to National Christian Charitable Fo	at any contributi oundation and is	ion, once accepted by the Fund, repr	esents an irrevocable con- ram Stamp Here
		(in togethed by ) our midneller in	
Giver 1: Signature Dat	te)		
Giver 2: Full Name (Please Print)			
Giver 2: Signature Date	te		