National Christian FOUNDATION®

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 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, you must complete our stock certificate or transfer agent gifting form available on our website.

*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, contact your financial institution and provide the information with the 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 (Fidelity)
For the account of National Christian Charitable Foundation Inc.
Account number 479-048720

If your account is with one of the brokerage firms below, please use the respective company to contribute to an NCF account:
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 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 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 and completed by hand, or you can type directly into the fields and save to your computer before sending.

Email
transfers@ncfgiving.com
(email transitions are not secure)

Mail or overnight delivery
National Christian Foundation
ATTN: Contribution Services
1150 Sanctuary Pkwy, Suite 350
Alpharetta, GA 30009

Fax
888.672.7302

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.

LETTER OF INTENT (LOI)

Please accept this letter as my intent to irrevocably transfer a portion of the positions from my financial institution to you. I understand that I must initiate this transfer with my broker. My intention is to contribute 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 / trusts:

Giver name(s) – individual, joint, trust, corporate, LLC, or other	Email address
Address	Phone number
Name of delivering broker, address, and phone number	Anticipated date of transfer
My account number with delivering firm	
The Brighter Days Giving Fund	4428937
NCF Giving Fund name	NCF Giving Fund number

Please deliver these shares to the following broker:

☐ Via DTC #0226 to National Financial Services (Fidelity) Acct #479-048720 for National Christian Charitable Foundation

Or if your account is held at one of the following: ☐ Merrill Lynch – Acct #210-04116 (DTC 8862)

☐ Schwab and Co – Acct #6595-8708 (DTC 0164)

I/we 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
Description of assets/name of security	Symbol	Exact number of shares***	Approximate $ value

***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 approximate $ value: _____

SIGNATURES

This is my written LOI 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 donor-advised 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)	Giver 2: Full name (please print)
Giver 1: Signature Date	Giver 2: Signature Date