NCF Heartland
National Christian Foundation®

Instructions for giving stocks and mutual funds

Use this stock giving form to inform NCF of your decision to make a contribution of publicly traded securities, such as stocks, mutual funds, and/or cash through your brokerage account.

Please note that, if you are sending physical stock certificates or stock held at a transfer agent (e.g., Computershare), you must complete the stock certificate or transfer agent gifting form.

Please contact your financial institution to request their required procedures and forms and to provide them with the delivery instructions found below.

If possible, for positions held at a transfer agent like Computershare, EQ, or Continental Stock, we recommend transferring the shares to your brokerage account first, then transferring to one of NCF's brokers.

Note: Individual circumstances vary. Please consult your tax advisor regarding your situation. Gifts from other tax-exempt organizations are not deductible.

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 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. If you are with another broker, please transfer to our Fidelity 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)
- Vanguard Acct#: 3398-2260 (DTC 0062)

Note: 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.

2. Notify NCF of your transfer

Please complete the form (below) 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 electronically, and save to your computer before sending to NCF.

Email: transfer@ncfgiving.com *Email transmissions 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

3. Confirm your transfer

NCF cannot initiate a transfer on your behalf. 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.

NCF National Christian Foundation®

LOI for giving stocks and mutual funds

Use this LOI (letter of intent) 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. Please send the completed LOI to NCF via email, mail, or fax. For important instructions, brokerage account information, and current email, mailing address, and fax details, visit **ncfgiving.com/stock-instructions.**

LETTER OF INTENT (LOI)

Account title (name of individuals, joint, trust, corporate, LLC, or other) | Email address

Address, City, State, Zip | Phone number

Name of delivering broker | Anticipated date of transfer

Account number with delivering firm (required only if submitting to brokerage as transfer authorization)

Integrity Resource Center, Inc. dba Unconventional Business Network | 222436

NCF fund name | NCF fund number

Please indicate the brokerage account which will receive the transferred shares:

☐ Fidelity (National Financial Services) ☐ Schwab and Co ☐ Merrill Lynch ☐ Vanguard

Please indicate which assets you intend to irrevocably transfer:

☐ Cash contributions: $_____ ☐ Stocks, mutual funds, or other publicly traded assets listed below:

SYMBOL/TICKER	SECURITY DESCRIPTION	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. If more than five positions are being transferred, please attach an additional sheet with the full list of positions to the LOI.

Total approximate $ value: _____

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 NCF, represents an irrevocable contribution to National Christian Charitable Foundation, Inc. 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

(866) 580-4483 (888) 672-7302 fax transfers@ncfgiving.com ncfgiving.com