



## 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 (LO) 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 instruction found below.

\*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 instruction 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 you 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 National Christian Foundation.

### Step 2: Notify NCF about your Transfer

**IMPORTANT:** Please send a copy of your Letter of Authorization to: Shelley Moreau with NCF by mail, email or fax. See contact information below:

#### Mail or Overnight Delivery

National Christian Foundation

ATTN: Contribution Services

11625 Rainwater Drive, Suite 500

Alpharetta, GA 30009

#### Email

[slmoreau@ncfgiving.com](mailto:slmoreau@ncfgiving.com)

Please note: email transmissions are not secure

#### Fax

(888) 672-7302

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.



Proverbs 31  
MINISTRIES

## STOCK 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 Proverbs 31 Ministries through the National Christian Charitable Foundation Inc. **If you have any questions or if there is a problem with this transfer please contact Shelley Moreau, with National Christian Foundation (NCF) at (704) 716-2905**

### Donor Information

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Email \_\_\_\_\_  
Phone \_\_\_\_\_

### Banking/Brokerage Information

Donor Bank/Brokerage Firm Name \_\_\_\_\_  
Contact Person \_\_\_\_\_ Phone \_\_\_\_\_  
Anticipated Date of Transfer \_\_\_\_\_

### **NCF Giving Fund Name: The Proverbs 31 Ministries Single Charity Fund # 1730492**

Proverbs 31 Ministries is a 501(c)(3) nonprofit organization. Our Federal Tax Identification Number is 56-1989197

**Proverbs 31 Ministries Contact:** Beth Griffiths, Director of Donor Operations Email: [beth@proverbs31.org](mailto:beth@proverbs31.org)

### **Please deliver these shares to the following broker:**

\_\_\_\_ Via DTC #0226 to National Financial Services Acct.# 479-048720 for National Christian Charitable Foundation, Inc.  
\_\_\_\_ Fidelity Acct. # 479-048720 \_\_\_\_\_ Merrill Lynch Acct. # 210-04116  
\_\_\_\_ Schwab Acct. # 6595-8708 \_\_\_\_\_ TD Ameritrade Acct. #901694820

Please irrevocably transfer stocks, mutual funds, or other publicly traded assets listed below:

Description of Assets/Name of Security	Symbol	Exact # of Shares***	Approx. \$ 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 not to be liquidated.\*\*\*

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 Proverbs 31 Ministries through National Christian Charitable Foundation and is not refundable to me for any reason.

\_\_\_\_\_  
Donor(s) Authorized Signature

\_\_\_\_\_  
Date

**IMPORTANT:** Please mail or email one copy to your investment advisor, one copy to NCF, and one copy to Proverbs 31 Ministries.