



National Christian
FOUNDATION®
Carolinas

Instructions for Giving Stock and Mutual Funds and Non-Cash Assets

Thank you for investing in **Great Lakes Outreach (GLO)** by donating stock, real estate or other non-cash assets. Please 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 to **Great Lakes Outreach (GLO)** that are being held electronically, please use the Letter of Authorization on the following page and instruction below. Include the giver's name and the **Great Lakes Outreach (GLO) Single Charity Fund** number on all deliveries.

Deliver All DTC Eligible Securities to:
securities may be DTC Clearing 0226,
accounts: National Financial Services LLC
For the account of: National Christian Charitable Foundation Inc.
Account Number # 479-048720

Other Securities: Mutual Funds and other
delivered to one of the following
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 National Christian Foundation.

Step 2: Notify NCF about your Transfer

IMPORTANT: Please send a copy of your Letter of Authorization to: Lacey with GLO and Alden Anderson 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

aanderson@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.



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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 **Great Lakes Outreach (GLO)** through the National Christian Charitable Foundation Inc. **If you have any questions or if there is a problem with this transfer please contact Alden Anderson with National Christian Foundation (NCF) at (704) 716-2900**

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: Great Lakes Outreach (GLO) Fund # 4833576

BBW is a 501(c)(3) nonprofit organization. **Our Federal Tax Identification Number is # 61-1542335.**

BBW Contact: Lacey Faieta, lacey@greatlakesoutreach.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
Description of Assets/Name of Security	Symbol	Exact # of Shares***	Approx. \$ 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 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 **GLO** through National Christian Charitable Foundation and is not refundable to me for any reason.

Gift Designation: _____ Where Most Needed

Donor(s) Authorized Signature _____

Date _____

IMPORTANT: Please send one copy to your investment advisor, one copy to NCF, and one copy to GLO.
Great Lakes Outreach, PO Box 14465, Charleston, SC 29422.