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AI-generated content may be incorrect.

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

Thank you for investing in **Great Lakes Outreach (GLO)** by donating stock, mutual funds, or other non-cash assets (including real estate). 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 instructions found below. \*Individual Circumstances vary. Please consult your tax advisor regarding your specific situation. 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:** | **Other Securities:** |
| DTC Clearing 0226  National Financial Services LLC  For the account of: National Christian Charitable Foundation, Inc.  Account #: 479-048720 | 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 - #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 (LO) to both Great Lakes Outreach, Inc. and National Christian Foundation. This can be sent via mail, email, or fax. Please send to:

|  |  |  |
| --- | --- | --- |
| **Mail or Overnight Delivery** | **Email** | **Fax** |
| **National Christian Foundation**  Attn: Contribution Services  11625 Rainwater Drive, Suite 500  Alpharetta, GA 30009 | [aanderson@ncfgiving.com](mailto:aanderson@ncfgiving.com)  *Note: email transmission may not be secure* | 888-672-7302 |
| **Great Lakes Outreach**  Attn: Financial Administrator  PO Box 14465  Charleston, SC 29422 | [usglo@greatlakesoutreach.org](mailto:usglo@greatlakesoutreach.org)  *Note: email transmission may not be secure* | Not available |

*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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**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 Code: | |  |
| Email: | |  | | | | | | | | | | |
| **Banking/Brokerage Information** | | | | | | | | | | | | |
| Donor Bank/Brokerage Firm: | | | |  | | | | | | | | |
| Contact Person: | | |  | | | | | Phone: |  | | | |
| Anticipated Date of Transfer: | | | |  | | | | | | | | |
| **Deliver these shares to the following broker:**   * GLO is a 501(C)(3) non-profit organization, Federal Tax ID: 61-1542335 * GLO Contact: Financial Administrator, Phone #843-996-8890, Email: [USGLO@GreatLakesOutreach.org](mailto:USGLO@GreatLakesOutreach.org) | | | | | | | | | | | | |
| q | **National Christian Foundation (NCF) Giving Fund Name: Great Lakes Outreach (GLO) Fund #4833576**  Via DTC #0226 to National Christian Financial Services, Acct #479-48720 for National Christian Charitable Foundation, Inc. | | | | | | | | | | | |
| q | Fidelity, Account #479-048720 | | | | | | | | | | | |
| q | Merrill Lynch, Account #210-04116 | | | | | | | | | | | |
| q | Schwab, Account #6595-8708 | | | | | | | | | | | |
| q | TD Ameritrade, Account #901694820 | | | | | | | | | | | |
| **Transfer Request** | | | | | | | | | | | | |
| Please, irrevocably transfer stocks mutual funds, or other publicly traded assets listed below: | | | | | | | | | | | | |
| Description of Assets and/or  Name of Security | | | | Symbol | | | Exact # 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 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.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Authorization** | | | | |
| **Gift Designation** | q General Contributions | q Specific Partner: | | |
| **Donor Authorized Signature:** |  | | **Date**: |  |
| **Donor Authorized**  **Signature:** |  | | **Date:** |  |

***IMPORTANT****: Please send a copy to your investment advisor, National Christian Foundation, and to Great Lakes Outreach.*