



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

Thank you for investing in **Raleigh Dream Center** by donating stock, real estate, or other non-cash assets. Please use the following Letter of Intent (LOI) to contribute publicly traded securities such as stock, mutual funds, and cash through your brokerage account. All contributions to your NCF Giving fund are irrevocable and are in most cases eligible for a tax deduction.* The Letter of Intent (LOI) 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 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 **Raleigh Dream Center** 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 **Raleigh Dream Center Single Charity Fund** number (#6398218) on all deliveries.

Deliver All DTC Eligible Securities to:

DTC Clearing 0226
National Financial Services LLC
For the account of: National Christian 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

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 the National Christian Foundation.

Step 2: Notify NCF about your Transfer

IMPORTANT: Please send a copy of your Letter of Authorization to Kathryn Williams with NCF-Raleigh by mail or email. See contact information below:

Mail or Overnight Delivery

National Christian Foundation
ATTN: Contribution Services
4514 Cole Avenue
Suite 1650
Dallas, TX 75205

Email

kwilliams@ncfgiving.com

Please note: email transmissions are not secure

Phone

919.438.0350

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 4-7 business days for your transfer to be liquidated, settled, and completely posted to your Fund.

Raleigh Dream Center Contact: Candace Porras, candace@raleighdreamcenter.org, 919-867-4446

STOCK LETTER OF INTENT



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 **Raleigh Dream Center** through the National Christian Charitable Foundation Inc. **If you have any questions or if there is a problem with this transfer please contact Kathryn Williams with National Christian Foundation - Raleigh at 919.438.0350.**

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: Raleigh Dream Center Single Charity Fund, #6398218

Raleigh Dream Center is a registered 501(c)3 Non-Profit Organization. Federal Tax ID is #47-2509570

Raleigh Dream Center Contact: Candace Porras, candace@raleighdreamcenter.org, 919-867-4446

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 (DTC 0226)
☐ Merrill Lynch Acct. # 210-04116 (DTC 8862)
☐ Schwab Acct. # 6595-8708 (DTC 0164)

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

Total 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 not to be liquidated. *** This is my written authorization to irrevocably transfer ownership of the assets specified in this form to the National Christian Charitable Foundation, Inc. I understand that any contribution, once accepted by the Fund, represents an irrevocable contribution to **Raleigh Dream Center** through the 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 Raleigh Dream Center.

6325 Falls of Neuse Rd, Ste 35-409, Raleigh, NC 27604 | <https://raleighdreamcenter.org/>