WORKFAITH

DONATE STOCK

and help provide faith-based training and coaching to anyone who desires long-term employment!

MAXIMIZE IMPACT AND MINIMIZE TAXES!

GIVE SMART, SAVE MORE

Benefits of Donating Stock:

- Avoid capital gains tax
- Deduct the full value of stock
- Nonprofit receives pre-tax gift

DONATE STOCK TO MAXIMIZE TAX SAVINGS

Say you have $5,000 worth of stock ($4,000 in gains). Rather than selling the stock to donate to your favorite nonprofit, you can donate the stock and save on taxes!

Sell Stock: pay $1,200 in taxes

Assuming 30% in capital gain tax

- OR -

Donate Stock: save $1,200 in taxes

Avoiding 30% in capital gain tax

DONATE STOCK

Thank you for your interest in donating stock to WorkFaith. It is an honor to be blessed through your generosity and obedience to the Lord to steward your resources to further the work HE is doing through WorkFaith. We pledge to be good stewards of your gifts, taking great care in how we manage and track the resources entrusted to us.

TO DONATE STOCK TO THE WORKFAITH CONNECTION

1. Notify Becky Turner, Chief Development Officer of Your Transfer.
The WorkFaith Connection uses the services of National Christian Foundation to process donated investments. **Becky Turner, Chief Development Officer**, will be able to assist you with your donation or if you have any other questions or concerns. She can be reached at bturner@workfaith.org OR 713.824.5649.

2. Initiate the Transfer with Your Broker.
To transfer stocks or mutual fund that are being held electronically, contact your financial institution and provide the information with the instructions below. Include the givers name and NCG Giving Fund number (#2050843) on all deliveries.

Deliver all DTC Eligible Securities to:
DTC Clearing 0026
National Christian Foundation Services, LLC (Fidelity)
For the account of National Christian Charitable Foundation
Account Number 479-048720

If your account is with one of the brokerage firms below, please use the respective company to contribute to an NCF account:
Fidelity .... Acct# 479-048720 (DTC 0226)
Schwab .... Acct# 6595-8708 (DTC 0164)
Merrill Lynch .... Acct# 210-04116 (DTC 8862)
TD Ameritrade .... Acct# 901694820 (DTC 0188)

3. Notify NCF of Your Transfer.
Please complete the Letter of Intent (LOI) on the next page of this document and send to NCF via email, mail, or fax. It can be printed and completed by hand or you can type directly into the fields and save to your computer before sending.

Email: transfers@ncfgiving.com

Mail or Overnight Delivery: National Christian Foundation
ATTN: Contribution Services
11625 Rainwater Drive, Suite 500
Alpharetta, GA 30009

4. Confirm Your Transfer
Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your contribution has been transferred from your account to WorkFaith NCF's account. Once received, it usually takes 4-7 business days for your transfer to be liquidated, settled, and completely posted to WorkFaith's NCF account.

YEAR END RECEIPTS

You will receive a receipt of your tax-deductible gifts in accordance with IRS requirements. To be considered a gift in the current year, the transfer of your stock to a WorkFaith account must be accomplished before midnight on December 31. If transferred by December 31st, it will be a current year gift, even if WorkFaith receives the proceeds of the sale of that stock in January.

LETTER OF INTENT (LOI)

Please accept this letter as my intent to irrevocably transfer a portion of the positions from my financial institution to you. I understand that I must initiate this transfer with my broker. My intention is to contribute these stocks to National Christian Charitable Foundation, Inc. If you have any questions, or if there is a problem with this transfer, please contact me immediately at the phone number below. This gift is being contributed by the following individuals / entities / trusts:

Giver name(s) – individual, joint, trust, corporate, LLC, or other	Email address
Address	Phone number
Name of delivering broker, address, and phone number	Anticipated date of transfer
My account number with delivering firm	
WorkFaith	479-048720
NCF Giving Fund name	NCF Giving Fund number

Please deliver these shares to the following broker:

☐ Via DTC #0226 to National Financial Services (Fidelity) Acct #479-048720 for National Christian Charitable Foundation

Or if your account is held at one of the following: ☐ Merrill Lynch – Acct #210-04116 (DTC 8862)

☐ Schwab and Co – Acct #6595-8708 (DTC 0164)

I/we irrevocably transfer the following assets:

☐ Cash contribution: $________________

☐ Stocks, mutual funds, or other publicly traded assets listed below:

Description of assets/name of security	Symbol	Exact number of shares***	Approximate $ value
Description of assets/name of security	Symbol	Exact number of shares***	Approximate $ 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 are not to be liquidated.

Total approximate $ value: ____________________________

SIGNATURES

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 the donor-advised fund, represents an irrevocable contribution to National Christian Charitable Foundation 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