



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

Thank you for investing in **Emerson Rose Heart Foundation** 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 **Emerson Rose Heart Foundation** 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 **Emerson Rose Heart Foundation 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

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: Chris Vaughn with NCF by mail, email, or fax. See contact information below:

Mail or Overnight Delivery

National Christian Foundation
ATTN: Contribution Services
1150 Sanctuary Pkwy, Suite 350
Alpharetta, GA 30009

Email

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



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 **Emerson Rose Heart Foundation** through the National Christian Charitable Foundation Inc. **If you have any questions or if there is a problem with this transfer, please contact Chris Vaughn 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: Emerson Rose Heart Foundation Single Charity Fund, # 4662912

Emerson Rose Heart Foundation is a registered 501(c)3 Non-Profit Organization.. Federal Tax ID is # 99-3079312

Emerson Rose Heart Foundation Contact: David Eill, david@emersonroseheart.com

Please deliver these shares to the following broker:

_____ Via DTC #0226 to National Financial Services Acct.# 479-048720 for National Christian Charitable Foundation, Inc.

_____ 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
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 **Emerson Rose Heart Foundation** 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 Emerson Rose Heart Foundations.