

Letter of Intent and Cover Letter with Specific Instructions for Gifts of Appreciated Securities (stocks and mutual funds)

Attached is a Letter of Intent (LOI) with all the details for donating stock to the National Christian Foundation. Donating stock is a wonderful way to support the Charity's ministry and mission. We have prefilled **Truett McConnell University's** information for the convenience of the Donor.

Below is a checklist you can send to your Donors to outline the process in detail:

1. **Identify the Stock:** Choose the stock you wish to donate. Ensure it is publicly traded and that you have held it for more than one year to maximize tax benefits.
2. **Initiate the Transfer:** Initiate the stock transfer to the National Christian Foundation (NCF) with your brokerage firm.
3. **Complete the Letter of Intent (LOI):** Fill out the attached notification (LOI) of the stock transfer with the necessary details:
 1. **The Truett McConnell University Single Charity Fund #6055811**
 2. Name and address of the giver
 3. The broker
 4. Anticipated date of transfer
 5. Exact number of shares and symbols

Please send this completed LOI to transfers@ncfgiving.com and copy Angie Shutley, ashutley@ncfgiving.com.

4. **Receive Confirmation:** NCF will liquidate the stocks the day after they are received. Then Angie Shutley will send you confirmation of when the proceeds of your gift will be posted to the Fund.
5. **Tax Receipt:** The Contributions team at NCF will send receipt of your donation, including the mean value of the stock at the time of transfer. This confirmation can be used for your tax records.