National Christian FOUNDATION®

# Instructions for gifting securities held by a transfer agent

Use the following form when gifting shares that are currently being held by a transfer agent. Transfer agents, such as BNY Mellon, Computer Share, and Wells Fargo Shareowner Services, provide asset servicing for many publicly traded companies. They are often used when employees or other owners of direct shares need to manage their securities. Instructions may vary for each of the publicly traded companies the transfer agent serves.

**Instructions for gifting through a transfer agent**

Please follow the instructions below to ensure a smooth transfer of your shares:

1. Obtain a stock assignment, transfer of ownership, or other gifting form directly from the transfer agent where your shares are being held.
2. Fill out the portions of the form that are relevant to your gift. If required by the transfer agent, be certain to obtain a medallion signature guarantee.*
3. Complete the Transfer agent gifting form found on the following page to identify the Giving Fund that will receive the contribution.
4. Send the completed transfer agent form and the following page to NCF. We suggest using a traceable overnight service or USPS return receipt requested.
5. Once NCF receives completed forms, we will then complete additional paperwork and forward all documents to the transfer agent for processing.

This process usually takes 2-4 weeks. Gifting forms sent directly to the transfer agent may take 8 weeks or more to retrieve, process, liquidate, and assign to the appropriate Giving Fund.

*A medallion signature guarantee can be obtained at any bank or other financial institution that participates in the medallion signature guarantee program. Please note that this is not the same as a notary.

# Transfer agent gifting form

Please include this page with your gifting application and any other required forms.

## CONTRIBUTOR INFORMATION

Please contribute my gift to this Giving Fund:

NCF Giving Fund number | NCF Giving Fund name

This gift is being contributed by the following individuals/entities:

Contributor name(s)

Address

Phone number and email address

## DELIVERY INSTRUCTIONS

When your form is complete, please review it and the related documents. Please be sure all relevant signatures are included. Mail your form and the related forms from your transfer agent via traceable mail to the address below:

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

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 National Christian Charitable Foundation, Inc. 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