

Letter of Authorization for Mutual Fund Transfers ~ TD Ameritrade ~

The Letter of Authorization below is provided for your convenience. If you are transferring mutual funds to National Christian Charitable Foundation, Inc., which are currently held in your brokerage account, please complete the letter and follow these important instructions:

1. All parties on the account(s) must sign the letter. The firm holding the securities may also require a signature guarantee which can be obtained at your bank or brokerage institution.
2. Please complete this form in its entirety and fax or mail to your broker. Also fax or email a copy to CSF at 262.796.9970 or sraasch@cstewardship.org.

For identification and receipting purposes, it is imperative for CSF to receive a copy of your Letter of Authorization. Unidentified gifts are placed in an endowment fund at CSF.

Today's Date

Name & Address of Delivering Broker

Please accept this letter as my authorization to irrevocably transfer a portion of the positions from my account with your firm. My account number is: _____.

1. _____ shares of _____
2. _____ shares of _____
3. _____ shares of _____

Please transfer the mutual fund shares to TD Ameritrade, Inc., for the account of National Christian Charitable Foundation, Inc. account number 901694820. *Shares should be transferred in kind and are not to be liquidated.*

My intention is to gift these mutual funds 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: _____ (phone).

Donor Name and Mailing Address

Signature

Signature Guarantee (if required)

Full Name (Please Print)

Name of Bank or Firm providing Signature Guarantee

Signature

Signature/Title of Officer

Full Name (Please Print)

Giving Fund: _____