## **LETTER OF INTENT (LOI)**

I understand that to initiate this contribution, I must complete this form or my broker's form and submit to my broker. I also understand in order for Bethany Christian Services to receive the proceeds, I need to email this form or my broker's form to giftplanning@bethany.org.

Please accept this letter as my intent to irrevocably transfer securities from my brokerage account to National Christian

Charitable Foundation, Inc. My email address My name My phone number The broker who will be delivering the securities to National Christian Charitable Foundation, Inc is: Name of broker Broker phone number. My account # at brokerage The above broker will deliver the shares to one of the following National Christian Charitable Foundation, Inc brokerage accounts (pick one below): via DTC #0226 National Financial Services (Fidelity) Account #479-048720 journaled to Merrill Lynch Acct# 210-04116 (DTC 8862) journaled to **TD Ameritrade** Acct# 901694820 (DTC 0188) journaled to **Schwab and Co** Acct# 6595-8708 (DTC 0164) Anticipated date the securities will be transferred to National Christian Charitable Foundation, Inc. is \_\_\_\_\_ When the securities arrive at one of the above brokerage accounts, please move the proceeds to: Bethany Christian Services Single Charity Fund # 1327718 The receipt should be made out to (individuals/entities/trusts): Street Address Name shares are registered in City, State, Zip I/we irrevocably transfer the following assets: \_\_\_ Stocks, mutual funds, or other publicly traded assets listed below \_\_\_ Cash Contributions \$\_ Exact # of shares\* Description of Assets/Name of Security Approx \$ Value Symbol Description of Assets/Name of Security Exact # of shares\* Approx \$ Value Symbol Exact # of shares\* Description of Assets/Name of Security Symbol Approx \$ 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 are not to be liquidated. **SIGNATURES** Giver 1: Full Name (Please Print) Giver 2: Full Name (Please Print) Giver 1: Signature Giver 2: Signature Date Date

