



## Letter of Authorization for Mutual Fund Transfers ~ Schwab ~

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 OCF at 407.872.1679 or [angie@clfinc.org](mailto:angie@clfinc.org).

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

\_\_\_\_\_  
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 Charles Schwab & Co., for the account of National Christian Charitable Foundation, Inc. account number 6595-8708. *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:** \_\_\_\_\_