

## STOCK & NON-CASH ASSET GIFTS



Legacy Imperative receives stock, mutual funds, real estate, business interests, and other non-cash gifts through our Single-Charity Fund at the National Christian Foundation (NCF).

Giving appreciated assets may provide significant tax advantages while supporting the mission effectively.

NCF provides stock-transfer instructions directly to donors to ensure each gift is routed correctly and without delay.

Your gift will be processed, liquidated, receipted, and deposited into:

The Legacy Imperative Single Charity Fund | Fund Number: #6141138

### STEP 1 — Contact NCF to Initiate the Gift

Before transferring stock or other non-cash assets, please contact NCF directly. They will provide the correct transfer instructions (such as DTC numbers and brokerage account details).





954-771-0110

#### **Tell NCF:**

"I would like to donate stock/securities to The Legacy Imperative Single Charity Fund (#6141138). Please provide the transfer instructions."

This ensures the gift is routed correctly and avoids delays.

# **STEP 2** — Notify NCF After You Initiate the Transfer

After submitting transfer instructions to your broker, please email NCF again so they can match the incoming shares:

### Include:

- Your name
- Your address
- Name of the security
- Number of shares
- Date transfer was initiated
- "Please apply this gift to The Legacy Imperative Single Charity Fund (#6141138)."

### **STEP 3** — Notify Legacy Imperative

Please also let us know so we can thank you and record your gift.

<u>gifts@legacyimperative.org</u>

239-206-9378

### **Other Non-Cash Asset Types**

NCF can also process:

- Real estate
- Life insurance
- LLC or LP interests
- Restricted stock

Oil & gas interests

Privately held business interests

Other complex assets

To begin a non-cash asset gift:

#### Tell NCF:

"I would like to donate a non-cash asset to support The Legacy Imperative Single Charity Fund (#6141138). Please advise on next steps."

NCF will guide you through the process, valuation, and required documentation.