



Letter of Instruction for Transfer of Assets

If you are transferring assets, please use this form and type or print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

1. Donor Instructions

Complete and deliver this Letter of Instruction as follows:

Mutual funds (two to four weeks to complete transfer from receipt of instructions): Provide letter with mutual fund statement to your custodian and notify National Charitable Endowment of the donation. Your custodian may require additional paperwork for processing.

Securities: Provide letter to your custodian and notify National Charitable Endowment of the donation. If shares are part of a DRIP, please call your custodian for instructions. Your custodian may require additional paperwork for processing.

Delivering Broker's Firm: _____ Broker's Name: _____

Date (MM/DD/YYYY): _____ Phone: _____

Address: _____

City: _____ State/Province: _____ ZIP/Postal Code: _____ Country: _____

Transfer Instructions

Originating Firm Account Number **FROM:** _____

National Charitable Endowment Account Number **TO:** _____

Note to Broker-Dealers — *this account number is not the valid delivery brokerage account. See the Broker-Dealer Instructions in the following section.*

Number of Shares	Approx. Dollar Amount if known
	\$
	\$
	\$

OF
OF
OF

Security/Mutual Fund Name

2. Signatures and Dates

Please accept this Letter of Instruction as my authorization to irrevocably transfer the above positions from my account with your firm to National Charitable Endowment.

Owner Name: _____

Owner Signature: _____

Date (MM/DD/YYYY): _____



NATIONAL CHARITABLE ENDOWMENT

Owner/Authorized Individual Name: _____

Owner/Authorized Individual Signature: _____

Date (MM/DD/YYYY): _____

3. Broker-Dealer Instructions

Deliver all eligible securities per these instructions. **Shares should be transferred in kind and are not to be liquidated.**

For credit to: [National Charitable Endowment](#) _____

For benefit of: _____

DTC: [5981](#) _____

Account Number: _____

Any physical deliveries (i.e., certificates) should be sent via registered mail to:
National Charitable Endowment, 23 Old Kings Highway South, Darien, Connecticut 06820