

Stock/Mutual Fund Transfer Form

Thank you for your desire to support The Timothy Initiative (TTI) through the donation of a stock/mutual fund transfer.

According to many publications, giving gifts of publicly-traded stock/mutual funds that have appreciated in value and have been owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock, and paying the capital gain tax is avoided.

Those who have stock in a brokerage account can be assisted by their broker in making a direct transfer of stock/mutual fund shares to TTI.

Please note the following information to donate to TTI (Tax ID# 80-0472803):

- Firm Name: **TD Ameritrade, Inc**
- Account Name: **The Timothy Initiative, Inc.**
- Account Number: **496070159**
- Depository Trust Company (DTC) Number: **0188**

Please contact Eric King, Director of Finance, with any questions at 919-761-5760 (ext. 104) or eric@ttionline.org.

**Please complete page 2 to ensure proper acknowledgment of your donation.
If signing digitally, please open document in Adobe.*

Please complete the form and email to eric@ttionline.org as a notification of your intent to transfer stock/mutual fund and to ensure proper processing.

Donor & Securities Information:

Name & Type of Security (e.g., Apple common stock)

Security Symbol

of Shares

_____/_____/_____
Date of Transfer

Donor Name

Donor Street Address

Donor City/State/Zip

Donor Telephone Number/Email

Broker Company/City/State

Broker Contact/Telephone Number

Donor Signature

Date

Donor Signature (if Joint Account)

Date

*Please consult a tax professional before making a transfer of stock/mutual fund to TTI.