



Instructions for giving stock and mutual funds

Use the following Letter of Intent (LOI) to inform TEAM of your decision to make a gift of publicly traded securities such as stock or mutual funds from your brokerage account.

STEP 1: INITIATE THE TRANSFER WITH YOUR BROKER

To electronically transfer stock or mutual funds, contact your financial institution and provide the information below.

Deliver all DTC Eligible Securities to:

DTC Number: 0164
Firm Name: Charles Schwab & Co., Inc
Account title: THE EVANGELICAL ALLIANCE MISSION
Account number: 3747-6383
Federal Tax ID Number: 36- 2169146

Note: Some financial institutions may require the use of their own form. Please check with your broker to see if the funds are transferable. If they are not transferable, please contact TEAM's Donor Relations Department.

STEP 2: Notify TEAM of Your Transfer

Please complete the Letter of Intent (LOI) on the second page of this document and send to TEAM via email or mail. It can be completed by hand, or you can type directly into the fields and save to your computer before sending.

Email:	Certified Mail or Overnight Delivery:	Phone:
Donors@team.org	TEAM	1-800-343-3144
(Email transmissions are not secure)	Attn: Donor Relations	
	PO Box 969	
	Wheaton, IL 60187-0969	

STEP 3: Confirm Your Transfer

Transfers must be initiated by your financial advisor or broker. Please confirm with your broker or advisor that your gift has been transferred from your account to TEAM. Once received, it usually takes 3-5 business days for your transfer to be liquidated, settled, and distributed to TEAM.

LETTER OF INTENT (LOI)

Please accept this letter as my intent to irrevocably transfer a portion of the positions from my financial institution to TEAM. I understand that I must initiate this transfer with my broker. If you have any questions, or if there is a problem with this transfer, please contact me immediately at the phone number below. This gift is being contributed by the following individuals / entities / trusts:

Giver Name(s): _____

Email Address: _____

Address: _____

Phone Number: _____

Name of Delivering Broker: _____

Broker's Address and Phone Number: _____

Anticipated Date of Transfer (DD-MM-YYYY): _____

My Account Number with Delivering Firm: _____

Designation of the Gift: _____

Please deliver these shares to the following broker:

Via DTC # 0164 to Charles Schwab & Co., Inc. Acct# 3747-6383

I/we wish to transfer the following assets:

Cash: \$ _____

Stocks, mutual funds, or other publicly traded assets listed below:

Name of Security: _____ Symbol: _____ Exact # of shares: _____ Appx. Value: _____

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Total Estimated Value*: _____

*Calculate this by multiplying the shares you plan to give by the current value. If donating multiple different types of securities, add the estimated totals of each.

Signatures:

Giver 1: Full name (Please print): _____ Signature: _____ Date: _____

Giver 2: Full name (Please print): _____ Signature: _____ Date: _____