

## **GIVING STOCK**

The Institute for Quality Education provides a way to give appreciated stock.

Here are the steps to make a charitable contribution of this kind:

1. **Please complete the “stocks/securities” form at [www.i4qed.org/donate](http://www.i4qed.org/donate) .**
2. **Please communicate with your brokerage firm that you wish to make a charitable in-kind transfer of publically traded securities to NCFI for The Institute for Quality Education Fund.** Sometimes brokerage firms will require you to use their own Letter of Authorization(LOA), some firms permit you to use the generic NCF LOA. You will find the NCF Authorization Letter by going to our website <http://www.i4qed.org/sgo/donors> under Donor Guides.
  - a. **Initiate and follow up on the transfer with your broker.** NCF’s receiving account information is listed on the Letter of Authorization. The receiving Giving Fund is The IQE Single Charity Fund #1491774.
3. **Submit a copy of the completed Letter of Authorization to Director of Giver Services NCFI, Anna Campbell, [acampbell@ncfgiving.com](mailto:acampbell@ncfgiving.com).** In order to properly complete your charitable gift to Institute for Quality Education Single Charity Fund, NCFI requires this form to verify your specific gift. The LOA also allows us to receipt the Giver accurately.

### **Other important notes:**

- Always consult with your professional advisors before making any gift.
- Institute for Quality Education and NCFI cannot authorize your broker to make any transfer. For that reason, be sure to follow up that the transfer has been initiated, particularly near year-end.
- Your federal gift receipt for tax purposes will be from NCFI. The scholarship tax credit for your state filing will be from Institute for Quality Education

**Most importantly, THANK YOU for your generosity in your ongoing support of The Institute for Quality Education!**