CHRISTIAN FOUNDATION FOR CHILDREN AND AGING
1 Elmwood Avenue, Kansas City, KS 66103
800.875.6564 • 913.384.6500 • www.hopeforafamily.org
Michael Calabria ● giftplanning@cfcausa.org

How to transfer shares of stock to CFCA

Stock shares may be transferred to CFCA by electronic wire or physical transfer. Because of security concerns and the complexities of a physical transfer, CFCA prefers transfer via electronic wire. However, instructions for both methods are included below.

Electronic stock transfers:

To initiate an electronic transfer, please notify your broker or financial institution that you wish to make a donation of stock to Christian Foundation for Children and Aging. The transfer will be made electronically via DTC to our account with Bank of Kansas City. Please note that Bank of Kansas City is an affiliate of Bank of Oklahoma. Your financial institution will require the following information:

Bank of Kansas City
c/o Brent Varzaly
4600 Madison Avenue, Suite 800
Kansas City, MO 64112
Tel: Direct 816.932.7302
Email: bvarzaly@bankofkansascity.com

Transfer instructions are as follows:

To DTC no. 901 (Bank of New York)
For the benefit of no. 016071 (Bank of Oklahoma)
With further credit to account no. 71-9968-03-4 (CFCA)

Please contact us regarding your pending stock donation.

Physical transfers of stock:

To initiate a physical transfer of stock certificates in your possession requires Stock Power forms signed by you for each certificate transferred to CFCA. If the stock certificate is registered in more than one name, both individuals are required to sign the Stock Power form. Stock Power forms must be medallion signature guaranteed by your bank or financial institution for each person listed on the stock certificate.

The Stock Power must be signed exactly as it appears on the face of the certificate. An officer of your bank or financial institution can witness your signature and perform the medallion signature guarantee. Upon receipt, your gift will be valued and acknowledged for tax purposes.

Please note that gift valuation will be as of the transfer date, not the date of your request. This is important, as the actual date of transfer into CFCA's trust account will determine the completion date, gift valuation and your deduction for tax reporting purposes.

CHRISTIAN FOUNDATION FOR CHILDREN AND AGING
1 Elmwood Avenue, Kansas City, KS 66103
800.875.6564 • 913.384.6500 • www.hopeforafamily.org
Michael Calabria • giftplanning@cfcausa.org

Please contact us for specific instructions regarding stock donations and physical transfer of stock. Stock Power forms with specific instructions for transfers to CFCA are available upon request. For security purposes, stock certificates and Stock Power forms should always be sent by certified mail in separate envelopes to the following address:

Gift Planning
Christian Foundation for Children and Aging
1 Elmwood Avenue
Kansas City, Kansas 66103

Transfers of privately held stocks

You may also wish to donate shares of privately held stock, which will require physical transfer of the stock certificates to CFCA. If the privately held stock is valued at greater than $10,000, a qualified appraisal is required. In addition, with gifts of privately held stock, there may be a discount for minority interest or lack of marketability. Your appraiser should both determine the discount (if any apply) and value the stock.

This document provides general information about gift planning and is not intended to provide individual financial, legal or tax information or advice. CFCA recommends that you speak with a tax adviser, financial adviser or attorney about how to make charitable giving part of your overall financial plan.