



NORTH CAROLINA
BAR FOUNDATION

Gifts of Publicly-traded Securities Transfer Instructions

Thank you for your interest in making a gift of securities to the North Carolina Bar Foundation. Please share these instructions with your broker to help facilitate your gift and contact the North Carolina Bar Foundation with any questions. All gifts to the North Carolina Bar Foundation are tax deductible. Our non-profit tax ID number is: 56-0767805.

If the securities are held electronically:

Banks or brokers may transfer stock to the North Carolina Bar Foundation's account with the following information:

- Brokerage: Wells Fargo Advisors
- Account Name: North Carolina Bar Foundation
- Account Number: 6870-7554
- DTC Number: 0141
- Phone Number: 800-872-3377

The North Carolina Bar Foundation account is a standard sub-managed brokerage account and we do not have a specific broker or financial advisor for this account. The NCBF is able to monitor all activity in this account online. Once your bank or broker initiates the transfer, we will be able to see all of the details on what shares were transferred and at what amount. If you have questions, please contact Jerry Hamm, NCBF Accounting Manager, at 919.677.0561.

It is important that the bank or broker contact a member of the Development team in order for us to identify the transfer in a timely and accurate manner. The following information from you or your broker is important:

- Donor's Name
- Stock information (number of shares, name of stock and symbol)
- Originating broker
- Designation of the gift

If you hold the securities in certificate form:

Please send by first-class mail or hand deliver the unendorsed certificate(s) along with a letter of transmittal which includes your name, address and where you want the gift designated.

In a separate envelope, mail to the same address a copy of the transmittal letter along with a stock power executive in blank for each stock certificate you are donating. You should sign one stock power for each stock certificate and have your signature guaranteed by a bank officer. The bank officer should note date the signature guarantee.

If you prefer to have your certificate re-registered:

The shares that you wish to donate to the North Carolina Bar Foundation should be registered to "The North Carolina Bar Foundation." The tax identification number is 56-0767805.

For assistance with a transfer or for more information, please contact:

Louise W. Harris, Foundation Director
Direct phone: 919.677.0992
Email: lharris@ncbar.org

Tom Hull, Director of Legacy Gifts
Direct phone: 919.657.1567
Email: thull@nchar.org