



Gift Securities for the Benefit of the Christian Reformed Church in North America (CRCNA) and its Ministries and Agencies:



Step 1. Work with your financial advisor/broker.

Let them know your intent to electronically transfer securities to the CRCNA. Your advisor or broker will typically have a form for you to fill out, and will request the following information regarding the CRCNA brokerage account:

CRCNA Broker: Merrill Lynch Grand Rapids
Contact Person: Larry Johnson (616) 334-4081
DTC# 8862
Account# 67604421
Account Name: CRCNA Gift Account

Our Legal Name:
Christian Reformed Church in North America
300 East Beltline Ave. NE
Grand Rapids, MI 49506-1208
Federal Tax ID #: 38-2051351

The Agencies and Ministries of the CRCNA use the same brokerage account to manage all stock sales. The funds are distributed to the agencies or ministries from the CRCNA.

Step 2. Let the CRCNA know your gift is coming.

Please let us know your gift is coming and the desired agency or ministry you are supporting with this gift. You can do this by emailing to advancement@crcna.org or by calling our advancement team at 877-272-6204 to let them know about the gift. When you reach out, please provide the following information:

Your Name: _____

Your Address: _____

Your Email Address: _____ Your Phone Number: _____

Name of Security and/or Symbol* _____ Number of Shares _____

Name of Security and/or Symbol* _____ Number of Shares _____

Name of Security and/or Symbol* _____ Number of Shares _____

*If gifting more than 3 securities, please include an additional form.

Please also include any other information you would like to share: i.e. Designate a ministry or agency:

If we do not receive notification of a gift, the shares will be liquidated and placed in a holding account until claimed and we are given instructions. Any gift unclaimed after 12 months will be disbursed to the Ministry Shares program and will be allocated to the CRCNA, Resonate, ReFrame, Thrive, Calvin University and Calvin Theological Seminary according to Synods Recommendations.

Step 3. Confirm your transfer.

Transfers must be initiated by your financial advisor/broker. Please confirm with them that the shares have been transferred from your account. The CRCNA or the named Agencies will provide you with a charitable receipt for your contribution that will include its value for IRS reporting purposes. The CRCNA and/or the named agency or program will also receive a copy of the letter. Per IRS requirements, your contribution will be reflected as the average of the high and low share price of the stock on the day the share was received, which may differ from the price the share was sold for.

If your security is held directly at a transfer agent, proprietary mutual fund firm, or in physical certificate form, please note that we use the Barnabas Foundation to assist us with the sale of the security.

If you have questions regarding the gifting of securities, please do not hesitate to contact us at **finance@crcna.org** or **616-224-0822**. We will be happy to assist you.