



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  
1700 28th Street, SW  
Grand Rapids, MI 49508  
**Federal Tax ID #:** 38-2051351

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

Please let us know your gift is coming. 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 \_\_\_\_\_

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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 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.