



Stock Gift Instructions

A gift of stock is one of the most advantageous ways you can make a gift to NCCJ. It's simple and offers many benefits:

- You can donate appreciated stocks, bonds, or mutual funds
- The total value of the stock upon transfer is tax-deductible
- There is no obligation to pay capital gains taxes on the appreciation

Questions? Please contact Alison Whitman Jones, NCCJ's Finance and Data Analytics Director, at ajones@nccjtriad.org or 336-272-0359 x 130.

To make your gift of stock, follow these steps:

Step 1: Complete Transfer. Instruct the institution where the stocks are held to transfer the shares to North Carolina for Community and Justice (formerly National Conference for Community and Justice of the Piedmont Triad, Inc.) at Merrill Lynch using the following codes:

DTC Number: 8862

Account Number: 74604025

Account Name: National Conference for Community and Justice of the Piedmont Triad, Inc.

NCCJ EIN/TIN: 06-1753756

If you or your broker have any technical inquiries regarding the transfer, please contact Sandy Rudolph at Merrill Lynch at sandra_rudolf@ml.com or 336-574-8252.

Step 2: Notify NCCJ of the Gift. Your stock donation will be transferred to NCCJ's account with no accompanying information about you, the donor. To ensure that we can identify your gift and send you a tax receipt, please give us the gift details – including the **name of the stock**, the **number of shares**, and the **date of transfer**.

You can notify NCCJ of your stock gift in one of these two ways:

- 1) Tell Alison at ajones@nccjtriad.org or 336-272-0359 x 130.
- 2) Fill out this [form](#).