



## Stock Gift Instructions

A gift of stock is one of the most advantageous ways you can make a gift to NCCJ of the Piedmont Triad. 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 our Director of Development, Erika Rain Wilhite, at [ewilhite@nccjtriad.org](mailto:ewilhite@nccjtriad.org) or 336-272-0359 x 15.

**To contribute stocks, follow these steps:**

**Step 1: Complete Transfer.** Instruct the institution where the stocks are held to transfer the shares to NCCJ of the Piedmont Triad at Merrill Lynch using the following codes:

**DTC Number:** 5198

**Account Number:** 74604025

**Account Name:** The National Conference for Community & 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](mailto:sandra_rudolf@ml.com) or 336-574-8252.

**Step 2: Notify NCCJ of the Gift.** Your stock donation will transfer 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, you will need to give us the gift details – including the **name of the stock**, the **number of shares**, and the **date of transfer**.

Please notify NCCJ of your donation in one of the following ways:

- Email these details to [ewilhite@nccjtriad.org](mailto:ewilhite@nccjtriad.org)
- Phone Erika Rain Wilhite at 336-272-0359 to provide this information
- Download our **Stock Gifts Notification Form** and mail the completed form to: NCCJ of the Piedmont Triad, 713 North Greene Street, Greensboro, NC 27401