

# Asset Donation Form

Please provide the following background information to the National Christian Foundation (NCF) to enable us to accept your asset donation. Answer all applicable sections (indicate N/A otherwise).

## GIVER CONTACT INFORMATION

### Giver

Title	First Name	Initial	Last Name
Date of Birth			
Social Security # / Tax		Address: Including P.O. Box, street address, suite or apt #	
City	State	Zip	
Home Phone	Business/Cell	Fax	
Email Address*			

\*This is required and will be your User ID on our website.

### Spouse, if giving jointly

Title	First Name	Initial	Last Name
Date of Birth			
Social Security # / Tax		Address: Including P.O. Box, street address, suite or apt #	
City	State	Zip	
Home Phone	Business/Cell	Fax	
Email Address*			

\*This is required and will be your User ID on our website.

### Preferred Method of Contact (Check one)

Email  Home Ph.  Bus. Ph.  Mail  Cell

### Preferred Method of Contact (Check one)

Email  Home Ph.  Bus. Ph.  Mail  Cell

Personal Federal Tax Rate: \_\_\_\_\_ % State Tax Rate: \_\_\_\_\_ %

Would the Giver like us to contact his/her professional advisor\* in this evaluation?

If so, please check one and provide the appropriate contact information:

CPA  Legal  Financial  Other \_\_\_\_\_

---



---



---

\*NCF recommends that all givers of non-liquid gifts seek and obtain their own independent tax and legal counsel.

**ASSET INFORMATION**

Full legal name of asset owner: \_\_\_\_\_

If applicable, full legal name of asset and all D/B/As: \_\_\_\_\_

**Asset Type (Check applicable type):**

- Real Estate       Limited Liability Company       Sub Chapter S Stock       C Corporation Stock
- Limited Partnership       LLC taxed as an S-Corp       LLC taxed as a C-Corp       Personal Property
- General Partnership       LLC Taxed as a Partnership       Other: \_\_\_\_\_

Full legal name of asset owner: \_\_\_\_\_

If asset is a holding company (owning one or more companies), please include full legal names and all D/B/As of underlying companies, as well as the nature of their underlying business operations:

---



---



---

Estimated value of Giver’s total ownership: \$ \_\_\_\_\_ How is this value derived?

What percentage and quantity of the asset does Giver desire to gift? \_\_\_\_\_

How long has Giver owned the asset? \_\_\_\_\_ Giver’s cost basis: \$ \_\_\_\_\_

How did the Giver acquire the asset? \_\_\_\_\_

**Is there a deadline for completing this gift that we should know about?**     Yes     No    If yes, deadline date: \_\_\_\_\_

**Is there a current binding obligation to sell this asset?**     Yes     No

Assets with debt can create additional tax obligations as a Giver makes the contribution. The following questions are asked to help us aid the Giver in evaluating the effect of the gift for the Giver and the Giving Fund.

**Are there currently any mortgages or other obligations attached to the asset?**     Yes     No

If yes, indicate the amount and age of debt: \$ \_\_\_\_\_

If gifting corporate business interests, please provide the name and contact information for the CFO or CPA for the business entity:

---



---

## CHARITABLE GOALS

Does giver have an NCF Giving Fund?  Yes  No

If yes, Fund number: \_\_\_\_\_ Fund name: \_\_\_\_\_

## NEXT STEPS

### Real Estate:

- |  |   |
|--|---|
| <input type="checkbox"/> Deed and legal description (if held by Trust or business entity, additional documentation required) | <input type="checkbox"/> Most recent property tax bill(s)                       |
| <input type="checkbox"/> Home Owners Association Covenants, Conditions & Restrictions  | <input type="checkbox"/> Property & Casualty Insurance policy                   |
| <input type="checkbox"/> Home Owners Association fees  | <input type="checkbox"/> Lease Agreement(s) - if applicable                     |
| <input type="checkbox"/> Title Insurance Report  | <input type="checkbox"/> Valuation/Appraisal (if available) or realtor's comp's |

NOTE: Phase I Environmental Site Assessment required for all commercial and agricultural properties, as well any real estate exceeding 5 acres.

### Corporation (S or C Corporation):

- |  |   |
|--|---|
| <input type="checkbox"/> Most recent corporate financial statement | <input type="checkbox"/> Bylaws   |
| <input type="checkbox"/> Most recent Federal tax return            | <input type="checkbox"/> List of shareholders & # of shares owned by each |
| <input type="checkbox"/> Form 1120S and K-1 for S-Corporations     | <input type="checkbox"/> Valuation/Appraisal (if available)               |
| <input type="checkbox"/> Articles of Incorporation                 | <input type="checkbox"/> Shareholder agreement and any amendments         |

### Limited Partnership:

- Most recent financial statement
- Most recent Federal tax return (Form 1065 and K-1)
- Certificate of LP Formation
- Partnership Agreement with any Amendments
- List of members and units or % owned by each
- Valuation/Appraisal (if available)

### Limited Liability Company:

- Most recent financial statement
- Most recent Federal tax return (Form 1065 and K-1)
- Articles of Organization
- Operating Agreement with any Amendments
- List of members and units or % owned by each
- Valuation/Appraisal (if available)

Please send this document by email or fax to the contact information below: