

# 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

Mr./Mrs. First Name Initial Last Name Suffix

Date of Birth

Address County

City State Zip

Phone: Home Business Cell

Email Address

Preferred Contact (Circle all that apply)

Email Home Ph. Business Phone Cell

### Spouse, if giving jointly

Mr./Mrs. First Name Initial Last Name Suffix

Date of Birth

Address: Including P.O. Box, street address, suite or apt #

City State Zip

Phone: Home Business Cell

Email Address

Preferred Contact (Circle all that apply)

Email Home Ph. Business Phone 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 circle 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 (circle applicable type):

Real Estate                      Limited Liability Company              Sub Chapter S Stock              C Corporation Stock  
Limited Partnership              General Partnership              Personal Property              Other: \_\_\_\_\_

Nature of asset's underlying business operations: \_\_\_\_\_

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 Giver acquire the asset? \_\_\_\_\_

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

Are there any potential buyers?  Yes  No Describe: \_\_\_\_\_

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 the 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

*Documents to include with the Asset Donation Form.*

### REAL ESTATE

- Deed and legal description (if held by Trust or business entity, additional documentation required)
- Home Owners Association Covenants, Conditions & Restrictions
- Home Owners Association fees
- Title Insurance Report
- Most recent property tax bill(s)
- Property & Casualty Insurance policy
- Lease Agreement(s) - if applicable
- 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)

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

### LIMITED PARTNERSHIP

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

### LIMITED LIABILITY COMPANY

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

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