

Investment Advisor ("IA") Information (This portion to be completed by IA.)

IA Firm Name (please print): _____
IA Master Account Number: _____ Service Team: _____

- Use this form to make charitable gift donations by transferring stock(s) and/or bond(s) from your Schwab account to a charitable organization.
- **Note:** This form cannot be used for mutual fund transfers.
- For donations to the Schwab Charitable Fund™, please use the form available at www.schwabcharitable.org.

1. Schwab Account Information

Eight-Digit Schwab Account Number _____

Account Registration _____

2. Securities to Be Transferred

Use the table below to designate securities to be transferred from the Schwab account listed above.

Name of Stock or Bond	Stock or Bond Symbol	Number of Shares to Be Transferred*

*Only whole share amounts are eligible for transfer. Fractional shares cannot be transferred. Shares cannot be specified in a dollar amount.

3. Transfer Instructions

Charitable Organization Information:

Receiving Brokerage Account Number _____

Account Registration _____

Contact Name _____

Telephone _____

DTC Electronic Transfer Information†:

Name of Receiving DTC Brokerage Firm _____

DTC Number _____

†Mutual funds are not eligible for DTC electronic transfer.

4. Please Read and Sign

Please accept this letter as authorization to irrevocably transfer the above listed security(ies) from my/our Schwab account to the designated charitable organization listed above. Shares will be transferred in kind and are not to be liquidated.

▶ _____ Date _____
Signature: Account Holder Print Name (mm/dd/yyyy)

▶ _____ Date _____
Signature: Additional Account Holder Print Name (mm/dd/yyyy)

