CLEAR PRINT

Charitable Gift Transfer
Letter of Authorization

charles SCHWAB

- **Complete, sign and fax to: 1-877-824-3726, Attention: Outgoing Transfers.**
- Use this form to make charitable gift donations by transferring stocks, bonds and/or mutual funds from your Schwab account to an Individual or charitable organization account held at another financial institution.
- For donations to the Schwab Charitable Fund™, please use the form available at www.schwabcharitable.org.

1. Schwab Account Information

Schwab Account Number
□□□□-□□□□
Account Title/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/Bond/Mutual Fund	Symbol/Ticker/CUSIP	Number of Shares to Be Transferred*	Purchase Date† (Optional)	Cost Basis† (Optional)

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

†Shares will be gifted based on a client's current cost basis method unless otherwise specified with a given purchase date and cost.

3. Transfer Instructions (If you are transferring mutual funds, please contact the receiving Institution to obtain delivery instructions.)

Charitable Organization or Individual Recipient Information:

Receiving Institution Account Number	Account Title/Registration		
Contact Name at Charitable Organization or Name of Individual Recipient	Telephone Number		
Mailing Address	City	State	Zip
Name of Receiving Institution	DTC Number (Required for Stock and Bond Transfers)		

Your name will appear as the charitable gift donor unless you check the following box:

☐ I wish for this gift to be anonymous.

4. Authorization to Transfer (All Account Holder signatures are required.)

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

Signature(s) and Date(s) Required

X Account Holder Signature	Print Name	Date
X Additional Account Holder Signature	Print Name	Date

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