

# Broker to Broker Charitable Securities Transfer Form

**Instructions for Donor:** Please complete this form to authorize the transfer of securities from your brokerage account to the receiving charity's account. Deliver this completed and signed form to your delivering broker, and send a copy to the receiving charity so they can identify and acknowledge your gift.

## 1. Donor (Transferor) Information

Donor Full Name:   
Donor Street Address:   
City, State, ZIP:   
Telephone Number:  Email Address:

## 2. Delivering Broker Information (Where securities are currently held)

Delivering Brokerage Firm:   
Financial Advisor Name:   
Advisor Phone Number:  Advisor Email/Fax:   
Donor's Brokerage Account Number:

## 3. Receiving Institution Information (Charitable Organization)

Charity Name:   
Receiving Brokerage Firm:   
DTC Number:  Charity Account Number:   
Charity Contact Person:   
Charity Contact Phone:  Charity Contact Email:

## 4. Description of Securities to Transfer

Please transfer the following securities from my account listed in Section 2 to the receiving institution listed in Section 3.

Share Quantity (or Cash Amount)	Name of Security / Stock Description	Ticker Symbol / CUSIP Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 5. Donor Authorization and Signature

I hereby authorize the delivering broker named in Section 2 to transfer the securities listed in Section 4 as a charitable contribution to the receiving institution named in Section 3. I understand that this transaction is an irrevocable gift.

Donor Printed Name:   
Donor Signature:  Sign here after printing  
Date:

*Note: If the brokerage account is jointly held, all account owners may be required to sign depending on your broker's policy.*

Joint Owner Printed Name (if applicable):

Joint Owner Signature:

Date: