

Donor Gift of Stock Transfer Form Template

Please complete this form to initiate a gift of stock/securities. Once completed, please print, sign, and deliver this form to your delivering broker to initiate the transfer, and send a copy to the receiving organization for tracking purposes.

1. Donor Information

Donor Full Name:	<input type="text"/>
Street Address:	<input type="text"/>
City, State, ZIP:	<input type="text"/>
Phone Number:	<input type="text"/>
Email Address:	<input type="text"/>
Donor Brokerage Account Number:	<input type="text"/>

2. Delivering Broker Information

Instructions to Donor's Broker/Financial Advisor:

Brokerage Firm Name:	<input type="text"/>
Financial Advisor Name:	<input type="text"/>
Advisor Phone:	<input type="text"/>
Advisor Email:	<input type="text"/>

3. Description of Stock / Securities to Transfer

Name of Security / Stock 1:	<input type="text"/>
Ticker Symbol:	<input type="text"/>
Number of Shares:	<input type="text"/>
Estimated Value (\$):	<input type="text"/>
Name of Security / Stock 2:	<input type="text"/>
Ticker Symbol:	<input type="text"/>
Number of Shares:	<input type="text"/>
Estimated Value (\$):	<input type="text"/>

4. Receiving Organization (Charity) Account Details

Please transfer the securities listed above to the following account:

Organization Name:	<input type="text"/>
Receiving Brokerage Firm:	<input type="text"/>
DTC Number:	<input type="text"/>
Account Number:	<input type="text"/>
Contact Person / Phone:	<input type="text"/>

5. Donor Authorization and Signature

By signing below, I authorize my broker to transfer the securities listed above to the designated receiving organization.

Donor Signature (Sign after printing):

Date:

Joint Owner Signature (if applicable):

Date: