

# Non-Profit Stock Gift Transfer Template

Please complete this form to initiate a transfer of stock as a charitable contribution. Once filled, deliver this document to your delivering brokerage firm, and send a copy to the receiving non-profit organization for acknowledgement and tax receipting purposes.

---

## 1. Donor Information (Transferor)

Donor Full Name:

Street Address:

City, State, ZIP:

Phone Number:

Email Address:

---

## 2. Delivering Brokerage Firm Information

Brokerage Firm Name:

Donor Account Number:

Financial Advisor / Contact Name:

Advisor Phone Number:

---

## 3. Description of Stock / Securities to Transfer

Please list the details of the asset(s) you wish to transfer:

Stock / Mutual Fund Name:

Ticker Symbol or CUSIP:

Number of Shares (or "All"):

---

## 4. Receiving Non-Profit Organization Information

Non-Profit Name:

DTC Participant Number:

Account Number:

Contact Person Name:

Contact Email / Phone:

---

## 5. Authorization and Signature

I hereby authorize my brokerage firm named in Section 2 to transfer the securities listed in Section 3 as a charitable gift to the non-profit organization named in Section 4.

Donor Signature:

Date:

Joint Owner Signature (if applicable):

Joint Signature Date: