

# Mutual Fund Donation Transfer Authorization Letter

Date:

## 1. Donor Information (Delivering Account)

Donor/Account Holder Name:   
Address:   
Phone Number:   
Delivering Financial Institution:   
Delivering Account Number:

## 2. Charity Information (Receiving Account)

Charity Name:   
Charity Tax ID / EIN:   
Receiving Brokerage/Institution:   
DTC Number:   
Charity Account Number:

## 3. Mutual Fund Details to Transfer

Please transfer the following mutual fund shares as a charitable donation:

Mutual Fund Name	Ticker/Symbol	Quantity (Shares or Dollar Amount)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 4. Authorization and Signature

I hereby authorize the delivering financial institution named above to transfer the mutual fund shares listed in Section 3 to the receiving charity account listed in Section 2 as a non-taxable charitable contribution. I understand this transaction is an irrevocable gift.

Donor Signature:  Date:   
Joint Holder Signature (if applicable):  Date: