

# Major Gift Securities Transfer Authorization Form

Please complete this form to authorize the transfer of securities as a major gift. Once completed, please print, sign, and send a copy to your delivering broker and a copy to the receiving organization.

## 1. Donor Information

Donor Full Name:

Joint Donor Name (if applicable):

Street Address:

City:  State/Province:  Postal/Zip Code:

Telephone:  Email Address:

## 2. Delivering Brokerage Firm Information

Brokerage Firm Name:

Financial Advisor Name:

Client Account Number:

Broker Telephone:  Broker Email:

## 3. Description of Securities to Transfer

Please specify the securities you wish to transfer:

Security Name / Description	Ticker Symbol / CUSIP	Number of Shares / Units
<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"/>

## 4. Receiving Institution (Charity) Information

Please instruct your broker to transfer the assets to the following account:

Organization Name:  [Charity/Organization Name]

Receiving Brokerage Firm:  [Brokerage Name]

DTC Number:  [DTC Number]

Account Number:  [Account Number]

Contact Person:  [Contact Name/Department]

Contact Phone/Email:  [Contact Info]

## 5. Authorization and Signature

By signing below, I/we authorize the transfer of the securities described above to the receiving institution designated.

Donor Signature:  Date:

Joint Donor Signature (if applicable):  Date:

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*Instructions for Donor: Once signed, please provide a copy to your delivering broker to initiate the transfer, and send a copy to the receiving organization for tracking and tax acknowledgment purposes.*