

# DTC Eligible Securities Charitable Transfer Form

Please complete this form to initiate a transfer of DTC eligible securities as a charitable contribution. Once completed, print this form, sign it, and submit it to your delivering broker-dealer to execute the transfer.

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## 1. Donor (Transferor) Information

Donor Full Name:

Donor Street Address:

City, State, Zip:

Phone Number:

Email Address:

## 2. Delivering Brokerage Account Details

Delivering Brokerage Firm Name:

Donor Account Number at Delivering Firm:

Delivering Broker Contact Person Name:

Delivering Broker Contact Phone:

## 3. Receiving Charity Information

Name of Receiving Charity:

Charity DTC Clearing Number:

Receiving Brokerage Firm Name:

Charity Account Number at Receiving Firm:

Charity Contact Person / Department:

## 4. Description of Securities to Be Transferred

Identify the securities you wish to transfer. For multiple securities, please complete a separate form for each, or attach an authorized list.

Name of Security / Issuer:

Ticker Symbol or CUSIP Number:

Number of Shares / Units to Transfer:

Purpose / Designation of Gift:

## 5. Authorization and Signature

I hereby authorize the delivering broker-dealer listed above to transfer and deliver the securities specified in Section 4 from my account listed in Section 2 to the receiving charity account listed in Section 3.

Donor Signature (Sign after printing):

Date (MM/DD/YYYY):

Joint Owner Signature (If applicable, sign after printing):

Joint Owner Date (MM/DD/YYYY):