

Publicly Traded Securities Donation Transfer Request

Please complete this form to initiate a transfer of publicly traded securities. Once completed, please print, sign, and send this form to your delivering broker and a copy to the receiving charity.

1. Donor Information

Donor Full Name:

Street Address:

City, State/Province, Postal Code:

Phone Number:

Email Address:

2. Delivering Institution (Donor's Broker)

Financial Institution / Brokerage Firm:

Financial Advisor / Broker Name:

Donor Account Number:

Broker Phone Number:

Broker Email Address:

3. Description of Securities to Transfer

1. Name of Security / Mutual Fund:

Ticker Symbol / CUSIP / ISIN:

Number of Shares / Units:

2. Name of Security / Mutual Fund (Optional):

Ticker Symbol / CUSIP / ISIN:

Number of Shares / Units:

4. Receiving Institution (Charity)

Charity Name:

Charity Registration Number / Tax ID:

Receiving Brokerage Firm Name:

Receiving Account Number:

DTC / CUID / Dealer-Rep Code:

5. Authorization and Signature

I hereby authorize and direct the transfer of the securities described above from my account to the receiving account of the charity named above as a charitable donation in-kind.

Donor Signature (Sign after printing):

Date (YYYY-MM-DD):