

# Charitable Stock Gift Transfer Authorization Form

Please complete this form to authorize the transfer of publicly traded securities from your brokerage account to the receiving charity. Once completed, please sign, print, and send this form to your delivering broker, and provide a copy to the charity for tracking purposes.

## 1. Donor Information

Donor Full Name:

Street Address:

City, State, Zip:

Telephone Number:

Email Address:

## 2. Delivering Brokerage Firm Information

Brokerage Firm Name:

Financial Advisor/Broker Name:

Broker Telephone:

Donor Brokerage Account Number:

## 3. Description of Securities to Transfer

### Security 1

Name of Security/Stock:

Ticker Symbol:

Number of Shares:

### Security 2

Name of Security/Stock:

Ticker Symbol:

Number of Shares:

## 4. Receiving Charity Information

Charity Name:

DTC Participant Number:

Charity Account Number:

Charity Contact Person:

Gift Designation/Special Instructions:

## 5. Authorization and Signature

I hereby authorize my delivering broker listed above to transfer the designated shares of stock to the receiving charity. This transfer is a charitable contribution.

Donor Signature (Sign after printing):

Date:

Joint Owner Signature (if applicable):

Date: