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Charitable Gift Transfer

Letter of Authorization

- **Complete, sign, and fax to: 1-877-824-3726, Attention: Outgoing Transfers. Clients of investment advisors: Please return this form to your advisor.**
- Use this form to make charitable gift donations by transferring stocks, bonds, and/or mutual funds from your Schwab account to an Individual or charitable organization account held at another financial institution.
- For donations to a Schwab Charitable™ account, please use the Contribute to Your Donor-Advised Fund Account form. You can find the form in the Forms Center located on the Resources tab at www.schwabcharitable.org.

1. Schwab Account Information

Schwab Account Number
Account Title/Registration

2. Securities to Be Transferred

For each security listed, indicate either Purchase Date and Cost Per Share or Alternate Accounting Method.

Name of Stock/ Bond/Mutual Fund	Symbol/Ticker/ CUSIP	Number of Shares to Be Transferred*	Purchase Date (Optional)	Cost Per Share (Optional)	OR	Alternate Accounting Method (Please indicate: FIFO, LIFO, Low-Cost, or High-Cost)
					OR	
					OR	
					OR	
					OR	

If a specific lot is not available, we will apply your account's default accounting method. FIFO (first in, first out) is applied when the mutual fund is set to average cost. Please reference the Cost Basis Disclosure Statement for additional details.

*Only whole shares of equity/stock can be transferred (any fractional shares requested will remain in the account). Shares cannot be specified in a dollar amount.

3. Transfer Instructions (If you are transferring mutual funds, please contact the receiving Institution to obtain delivery instructions.)

Charitable Organization or Individual Recipient Information:

Receiving Institution Account Number	Account Title/Registration		
Contact Name at Charitable Organization or Name of Individual Recipient	Telephone Number		
Mailing Address	City	State	Zip
Name of Receiving Institution	DTC Number (Required)		

Your name will appear as the charitable gift donor unless you check the following box:

☐ I wish for this gift to be anonymous.

4. Authorization to Transfer (All Account Holder signatures are required.)

Please accept this letter as authorization to irrevocably transfer the above listed security(ies) from my/our Schwab account to the designated individual or charitable organization listed above. Shares will be transferred in kind and are not to be liquidated. I hereby release and discharge Schwab and its affiliates from any liability or claims in connection with the aforementioned instructions and agree to indemnify and hold Schwab harmless against any losses from any action, claim, or demand of any person based upon Schwab acting under these instructions.

Signature(s) and Date(s) Required

X Account Holder Signature	Print Name	Date
X Additional Account Holder Signature	Print Name	Date

ADA

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