CLEAR PRINT

charles SCHWAB

Transfer of Assets Out
Partial Account or Charitable Gift Transfers

- **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 Partial Transfers or 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 located on the Resources tab at www.schwabcharitable.org.

1. Schwab Account Information

Schwab Account Number | **Account Title/Registration**

2. Transfer Instructions

☑ **Charitable Gift** ☐ **Partial Transfer** *(Not a charitable gift)*

Please note: If you do not select Charitable Gift, this distribution will be processed as a Partial Transfer.

Charitable Organization or Individual Recipient Information. (If you are transferring mutual funds, contact the receiving institution to obtain delivery instructions.)

N7M002945 — **Receiving Institution Account Number**

Engiven Foundation — **Account Title/Registration**

Lesley Carver — **Contact Name at Charitable Organization or Name of Individual Recipient**

(410)825-0995 — **Telephone Number**

Pershing, LLC — **Name of Receiving Institution**

0443 — **DTC Number** (Required)

If you selected Charitable Gift above, your name will appear as the charitable gift donor unless you check the following box:

☐ **I wish for this gift to be anonymous.**

3. 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)	**Alternate Accounting Method** (Please indicate: FIFO, LIFO, Low-Cost, or High-Cost)

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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.

For additional assets, please attach a spreadsheet.

4. Authorization to Transfer

Please accept this letter as authorization to transfer the above-listed security(ies) from my/our Schwab account to the designated individual or charitable organization listed above. Transfers made as a Charitable Gift are irrevocable. 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.

Note: For a transfer from a Tenants in Common account, both Tenants must sign.

Signature(s) and Date(s) Required

✘ _____ _____

Signature: Account Holder **Today's Date** *(mm/dd/yyyy)*

_____

Print Name

✘ _____ _____

Signature: Additional Account Holder **Today's Date** *(mm/dd/yyyy)*

_____

Print Name

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