



CONTRIBUTE TO A CHARITABLE GIFT ACCOUNT

IMPORTANT INSTRUCTIONS FOR COMPLETING THIS FORM

The form you requested follows this page. You can either complete it on your computer and then print it out, or print it out first and fill in by hand.

QUESTIONS? CALL 800.746.6216
www.schwabcharitable.org

FOLLOW THESE EASY STEPS TO COMPLETE YOUR FORM:

1. Scroll down and type the requested information in the corresponding field.

Name (First)

- You can move among the fields by using your mouse or the “Tab” key.
- If you’d like to clear all the fields you’ve completed, click the **CLEAR** button.

2. When you’ve completed the form, click the **PRINT** button.

Please note: Adobe® Reader® does not allow you to save your work. It’s very important that you print out your form immediately after completing it.

3. **When your form is complete, please review it, sign it and send it via mail or overnight delivery to the following address:**

Schwab Charitable Fund
211 Main Street
San Francisco, CA 94105

Fax delivery can be accepted for accounts funded with wire transfers and transfer of assets from a Charles Schwab & Co., Inc. account. In the case of fax delivery, please retain the original form for your files.

Fax: 877.535.3852

Be sure to enclose any accompanying materials (such as a check for an initial contribution) to fund a new account. Should you have any questions, or need help, just call 800.746.6216.

CLEAR

PRINT



CONTRIBUTE TO A CHARITABLE GIFT ACCOUNT

SCHWAB CHARITABLE FUND™

QUESTIONS? CALL 1-800-746-6216

FAX 877-535-3852

www.schwabcharitable.org

Please contribute the assets specified below to:

Charitable Gift Account Number

Please identify contributions made by each Donor to ensure that each Donor receives an appropriate acknowledgement for tax purposes. If contributions are being made by multiple Donors, please make a photocopy of this form and clearly indicate which assets are contributed by which Donor.

Please select the type of contribution(s) you would like to make and complete the sections indicated:

- Transfer of assets from a Charles Schwab & Co., Inc. account:** Complete Sections 1 and 5
Please note, you can also transfer assets from your Schwab account through the secure online Donor Center at www.schwabcharitable.org.
- Check, money order or wire transfer:** Complete Sections 2 and 5
- Security certificates held in personal possession:** Complete Sections 3 and 5
- Restricted stock or other assets:** Please call 800-746-6216 for instructions
- Transfer of assets held at financial institutions other than Charles Schwab & Co., Inc.:** Complete Sections 4 and 5

Contributions to your Charitable Gift Account can include marketable securities including mutual funds and cash. Contributions have a minimum of \$500. All contributions are irrevocable, and may be tax-deductible.

1 TRANSFER OF ASSETS FROM A CHARLES SCHWAB & CO., INC. ACCOUNT

Also complete Section 5 before sending or faxing the signed form to the Fund.

FROM:

Schwab Account Number†	Name(s) on Account
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† If you are transferring assets from multiple Schwab accounts, please complete a separate form for each account.

SPECIFY ASSETS

- Cash amount: \$ _____
- Stocks, bonds, mutual funds or other assets:

Description of Assets/Name of Security	Symbol (if applicable)	Number of Shares or "All"‡ (mandatory)	Approximate \$ Value
			TOTAL

‡ Number of shares must be specified. The Fund will transfer assets based on the number of shares specified, not the approximate \$ value indicated since security values may fluctuate.

2 CONTRIBUTION BY CHECK, MONEY ORDER OR WIRE TRANSFER

Wire transfer instructions are on the back page of this form. Also complete Section 5 before sending the signed form to the Fund.

<input type="checkbox"/> Check or money order enclosed for \$ _____ (Make payable to Schwab Charitable Fund)	<input type="checkbox"/> Wire \$ _____
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3 TRANSFER SECURITY CERTIFICATES HELD IN PERSONAL POSSESSION

Also complete Section 5 before sending the signed form to the Fund.

ENDORSE STOCK OR BOND CERTIFICATES

Please have all registered owners of the donated assets endorse each certificate by writing "Charles Schwab & Co., Inc." between the words "appoint" and "attorney" in the space provided on the back of the certificate. All registered owners must sign and date each certificate exactly as their name appears on the face of the certificate. **Notarize or obtain a signature guarantee on the back of each security certificate as well.**

SPECIFY SECURITIES

Name of Security	Number of Shares	Approximate \$ Value
		TOTAL

Note: If you are sending security certificates, we suggest that you send them with this form via registered, certified or overnight mail service, and request a return receipt.

4 TRANSFER OF ASSETS FROM FINANCIAL INSTITUTIONS OTHER THAN CHARLES SCHWAB & CO., INC.

Important: Check only ONE of the instruction boxes below, follow the specified instructions, and initial the authorization box below.

I will instruct my financial institution to initiate the transfer of assets by:

- Contacting my financial institution directly to request the required procedures and forms to expedite the transfer process, and
- Completing Sections 4 and 5 of this form (*a separate form for each transfer requested of my financial institution*), and sending to Schwab Charitable Fund.

I understand that I will contact and instruct my financial institution directly to initiate the transfer of assets to my Charitable Gift Account. I will confirm with my financial institution that the transfer of assets has been completed as specified in the delivery instructions on the back page of this form.

(Donor initials)

OR:

I will instruct Schwab Charitable Fund to initiate the transfer of assets by:

- Completing Sections 4 and 5 of this form.
- Sending the signed form to Schwab Charitable Fund for each transfer requested.
- **Attaching a copy of my most recent statement for each account from which I am transferring.**

(Donor initials)

TO:

Charitable Gift Account Number

Name(s) on Account

FROM:

Account Number

Name(s) on Account

Name of Firm Holding Assets	Firm Telephone Number
Firm Mailing Address	City, State, Zip Code

SPECIFY ASSETS

Cash amount: \$ _____

Stocks, bonds, mutual funds or other assets:

Description of Assets/Name of Securities	Symbol (if applicable)	Number of Shares or "All"‡(mandatory)	Approximate \$ Value
			TOTAL

‡ **Number of shares must be specified.** The Fund will transfer assets based on the number of shares specified, not the approximate \$ value indicated since security values may fluctuate.

5 AUTHORIZE CONTRIBUTION

This is my written authorization to irrevocably transfer ownership of the assets specified in Sections 1, 2, 3 or 4 of this form (including restricted stock) to Schwab Charitable Fund. I understand that any contribution, once accepted by the Fund, represents an *irrevocable contribution* to Schwab Charitable Fund and is not refundable to me for any reason. For Fax Submissions: It is the intention of each of the undersigned donors that Schwab Charitable Fund may rely on a facsimile copy of his or her signature as a binding and enforceable signature, admissible in any proceeding to the same extent as if this form was submitted in manual form.

SIGNATURES REQUIRED

For assets held in a joint account, a registered owner of the donated assets must provide a signature, and is acting on behalf of all the registered owners of the assets. For assets held in other types of accounts, all registered owners must provide a signature. Note: If you are donating security certificates held in personal possession, signature(s) must correspond with the name(s) written on the face of the certificate(s) or bond(s) in every particular without alteration.

Donor Name	X Donor Signature	Date
Donor Name	X Donor Signature	Date

DELIVERY INSTRUCTIONS

RECEIVING FIRM INFORMATION

Schwab Charitable Fund
211 Main Street
San Francisco, CA 94105
800-746-6216
Tax ID#: 31-1640316

WIRE TRANSFER INSTRUCTIONS

(for US Dollars from within the US)

Wire to: Citibank N.A.

111 Wall Street
New York, NY 10005
ABA#: 021000089
FBO: Charles Schwab & Co., Inc.
Citibank Account: 40553953
Charitable Gift Account Number: _____
Donor Name: _____

For all other currencies or transfers being initiated from outside the US, please call a donor relations specialist at 800-746-6216.

DELIVERY INSTRUCTIONS

All deliveries MUST include client name and the Charitable Gift Account number.

Forward Checks, Physical Delivery of Securities, and the Signed Form

Via U.S. Mail or overnight delivery:

Schwab Charitable Fund
211 Main Street
San Francisco, CA 94105

*Via Fax:

Schwab Charitable Fund
877-535-3852

**Fax delivery can only be accepted for wire transfers and transfer of assets from a Charles Schwab & Co., Inc. account.*

All DTC-Eligible Securities

Deliver to DTC Clearing 0164, Code 40

Fed Book-Entry Securities (e.g., Treasury Notes)

JPM CHASE/CCC
ABA#: 021000021
Charles Schwab A/C G69873
FFC: Charitable Gift Account Number: _____

PRINT