

# NOMINATE A GRANT TO CHARITY



SCHWAB CHARITABLE FUND™

## 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.

NOMINATE A GRANT ONLINE THROUGH OUR SECURE DONOR CENTER AT [WWW.SCHWABCHARITABLE.ORG](http://WWW.SCHWABCHARITABLE.ORG).

QUESTIONS? CALL 1-800-746-6216

## 1 CHARITABLE GIFT ACCOUNT INFORMATION

Account Number

Account Name *(optional)*

## 2 RECOMMEND A CHARITY

Legal or Official Name of Charitable Organization				
Mailing Address			Contact Name <i>(if necessary)</i>	
City	State	Zip	Telephone Number	Charitable Organization's Federal Tax ID Number <i>(if known)</i>

## 3 GRANT AMOUNT \$ \_\_\_\_\_ *(minimum of \$100)*

## 4 SPECIFY ACKNOWLEDGEMENT OPTIONS

- Please make this an anonymous grant.
- Please include the following information in the acknowledgement:
- The Donor's name(s)  
How you wish your name(s) to appear in the letter: \_\_\_\_\_
  - The Account's mailing address
  - The Account's special name
- Additional information for the receiving charity: \_\_\_\_\_

## 5 RESTRICTIONS ON GRANTS

*I hereby certify that if this grant is distributed:*

- *It will not fulfill a pre-existing pledge to the recommended charity.*
- *Neither I nor any individual will receive any goods, services or other private benefit from the charitable organization as a result of this grant.*  
*Note: Grants may not be used to support any charitable event, including fundraising dinners, concerts, auctions or other benefit functions when the Donor would receive a quid pro quo, such as the benefit of being able to attend a fundraising dinner or event.*
- *It will not be used for lobbying, political contributions or to support political campaign activities.*
- *I cannot deduct the grant as I have already deducted my gift to the Schwab Charitable Fund. I will disregard any tax receipt from the recommended charity.*

*I understand that this grant recommendation will be subject to all the terms and conditions that apply to the account, in accordance with Section 7 of the Program Policies.*

<b>X</b> Donor or Nominator Signature	Name (please print)	Date
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## 6 DELIVERY INSTRUCTIONS

Send this form via mail, overnight delivery or fax:

Schwab Charitable Fund  
211 Main Street  
San Francisco, CA 94105  
Fax: (877) 535-3852