

Recommend a Grant to a Charity



Questions or Need Assistance?

Call 800-746-6216 or email ask@schwabcharitable.org

Grants can be recommended online at schwabcharitable.org or on the Schwab Mobile app.

1. Donor-Advised Fund Account Information

_____|_____|_____|_____|_____|_____| - ____|____|____|____|____|____|
Donor-Advised Fund Account Number

2. Select Your Charity

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Legal or Official Name of Charitable Organization Charitable Organization's Federal Tax ID Number Telephone Number

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Mailing Address Mailing City, State, Zip Code

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Contact Name Contact E-mail

3. Grant Details

\$ _____ (minimum of \$50)
Grant Amount

Make this an anonymous grant.

Include the following information in the acknowledgment:

- The Account's special name (If you select this option, the Account name appears in the grant letter.)
- The Account Holder's name(s)
- Name(s) to be acknowledged

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

The mailing address for the Account

Additional information for the receiving charity (please note restrictions below):

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

Additional information for Schwab Charitable staff:

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

NOTE: Schwab Charitable may contact you to confirm this information. The Grant Award letter might include language to indicate the Account Holder's wish to waive any benefit associated with this grant.

4. Restrictions on Grants

Before you make your recommendation, please review these grant restrictions.

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 provide any portion of admission to any charitable event or other benefit functions when the Account Holder would receive a quid pro quo, such as the value of a dinner or the privilege to attend, that if received in return for a charitable contribution, would reduce an Account Holder's charitable deduction.

- 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 Schwab Charitable. I will disregard any tax receipt from the recommended charity.
- It will not support a private non-operating foundation.
- It will not support a scholarship if any Account Holder or Advisor to this Account (or any relative) is an eligible recipient or has a role in selecting the scholarship recipient.

- It will not support a specific missionary project of an individual who is related to me or any other Account Holders or Advisors to this Account.

Investment Advisors, CPAs or other professional advisors also need to adhere to the following:

- In conveying this grant recommendation, I am acting as an agent for the Account Holder on this Account. I will maintain a record of the Account Holder's grant instructions and will provide a copy to Schwab Charitable upon request. I will not receive any compensation or personal benefit from Schwab Charitable for conveying the Account Holder's grant recommendation.
- I certify that if the grant I am recommending is for a supporting organization, neither I nor any other Account Holders on the this Schwab Charitable account, nor any parties related to me or to any other Account Holders on the Schwab Charitable account, directly or indirectly control any supported organization of the recommended grant recipient. Supporting organizations are 501(c)(3) public charities that typically carry out one or more functions of their supported public charity (for example, an alumni association that fundraises for a university, or a parent-teacher association that performs certain functions at a school).

I understand that this grant recommendation will be subject to all the terms and conditions that apply to the Account, in accordance with Section 6 of the Program Policies.

| X _____
Signature: Account Holder, Additional Account User, Investment Advisor Agent or Dual Professional Account Manager and Agent

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Name (Please print)

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Date (mm/dd/yyyy)

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Investment Firm Name (If signed by Investment Advisor Agent or Dual Professional Account Manager and Agent)

5. Delivery Instructions

Fax*: (877) 535-3852
Regular Mail: Schwab Charitable P.O. Box 628298 Orlando, FL 32862
Overnight Delivery: Schwab Charitable 1958 Summit Park Dr. Suite 200 Orlando, FL 32810

Please retain a copy of all original documents for your files.

* For Fax Submissions: It is the intention of each of the signatory Account Holders that Schwab Charitable 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.

Schwab Charitable is the name used for the combined programs and services of Schwab Charitable Fund, an independent nonprofit organization. Schwab Charitable Fund has entered into service agreements with certain affiliates of The Charles Schwab Corporation.