

Recommend a Grant to Charity

This form may be used to recommend a grant from your Schwab Charitable™ donor-advised fund. Before recommending a grant, consider the following resources: *Granting Guidelines, Explore Charities, Making Informed Granting Decisions.*

Donor-Advised Fund Account Number

For fastest processing, please recommend your grant online on the Client Center or on the Schwab Mobile app.

Schwab Charitable retains final authority over the distribution of all grants and may decline or modify a grant recommendation that is inconsistent with the Schwab Charitable *Program Policies*, or for any other reason.

Questions or need assistance? Call 1-800-746-6216 or email ask@schwabcharitable.org.

1. Organization Information

Organization Legal Name Federal Employer Identification Number (FEIN)

Mailing Address

City State or Province Zip or Postal Code

Primary Telephone Number Fax Number

General Email Address Web Address

2. Grant Amount

\$ _____ (minimum \$50)

3. Grant Purpose

I recommend that the charity can use this grant wherever they need it most (*the quickest way to process because this grant purpose follows IRS requirements*)

I recommend a specific use for this grant or need to customize (*this may take longer to process as we determine if your specific use/customization meets IRS guidelines*)

If there is a specific use, please provide additional information for the receiving charity:

Details for Schwab Charitable staff:

4. Grant Letter

Once your grant recommendation is approved, we're going to send a grant letter to the charity named above. The grant letter includes the check and the information you choose below (select what you want included):

The special account name The mailing address of the person recommending the grant

Names to be acknowledged _____

OR

Make this an anonymous grant

5. Grant Restrictions

Before finalizing your grant recommendation, please review the following restrictions:

- The grant may not be used to pay for admission to any event, including fundraising dinners, galas, concerts, auctions, or other benefit functions.
- The grant may not fulfill an enforceable pledge to the recommended charity.
- Neither the Account Holder nor any other individual can receive any goods, services, or other private benefit as a result of the grant.
- The grant may not be used for lobbying, political contributions, or to support political campaign activities.
- The grant recipient must not be a private non-operating foundation.
- The grant recipient must not be a non-functionally integrated Type III supporting organization.
- The grant recipient must not be a supporting organization that supports one or more organizations directly or indirectly controlled by current or future account holders or additional account users, relatives, or their affiliates.
- The grant may not fund 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.
- The grant may not support a specific missionary who is related to the account holder(s) or advisor(s) to this account.

This is only a summary. Please refer to the Schwab Charitable™ *Program Policies* for details. If there is a discrepancy, the *Program Policies* control over this summary.

6. Certification

By signing below, I/we understand and certify that:

- I/we have read and understand the Schwab Charitable *Program Policies* and that this grant recommendation will not violate any grant restrictions as noted in Section 5.
- To the best of my/our knowledge, all information presented on this form is accurate. I/we will promptly notify Schwab Charitable in writing of any changes.

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 Fund™ upon request. I will not receive any compensation or personal benefit from Schwab Charitable Fund for conveying this grant recommendation.

X

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

Today's Date (mm/dd/yyyy)

Name (Please print.)

Investment Firm Name (Please print.)
If signed by Investment Advisor Agent or Dual Professional Account Manager and Agent

7. Options for Sending Forms

<p>Return Instructions: Upload online with secure messaging (if you are an existing client and have online access to your account). 1. Go to www.schwab.com and log in to your account. 2. Click Message Center (under the Services tab), and then click Upload Document. 3. Select your Charitable Account in the drop down menu of accounts.</p>	<p>Fax:* 1-877-535-3852</p>	<p>Regular Mail: Schwab Charitable P.O. Box 628298 Orlando, FL 32862</p>	<p>Overnight Delivery: Schwab Charitable 1958 Summit Park Dr., Suite 200 Orlando, FL 32810</p>
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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 were 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 subsidiaries of The Charles Schwab Corporation.