



# CHARITABLE DONATION FORM

E\*TRADE Securities, LLC  
 P.O. Box 484  
 Jersey City, NJ 07303-0484  
 General Fax Number: 1-866-650-0003  
 From Outside the US: +1-678-624-6950

- Use this form to request a charitable donation from your individual, joint, trust, business, or IRA account.
- If you are making a charitable donation from an IRA please also complete and send an [IRA Distribution Request form](#).
- If you are donating specific tax lots, please note that we will process your request on a best-efforts basis. If the specific tax lots indicated on this form are not available at the time of transfer, the shares donated will be selected on a FIFO basis (first-in, first-out).
- Include a [Fax Cover Sheet](#) when submitting documents by facsimile.
- Need Help? Send us a secure message through [www.etrade.com](http://www.etrade.com) or call 1-800-ETRADE-1.

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Your E*TRADE Securities Brokerage Account Number		

## 1. ACCOUNT HOLDER INFORMATION

PRIMARY ACCOUNT HOLDER	CO-ACCOUNT HOLDER, IF APPLICABLE
Name/Account Title	Name/Account Title

## 2. TO DONATE CASH/STOCK TO AN ORGANIZATION WITH AN EXISTING E\*TRADE ACCOUNT, COMPLETE THIS SECTION (EMPLOYEE STOCK PLAN ACCOUNTS MUST ALSO COMPLETE SECTION 5)

Receiving Account Title				Receiving Account Number			
Cash Amount							
Symbol	Number of Shares	Purchase Date	Purchase Price	Symbol	Number of Shares	Purchase Date	Purchase Price

Note: If the purchase date *and* purchase price are not completed on the form, the shares donated will be selected on a FIFO basis (first-in, first-out). If the purchase price *or* purchase date is not completed on the form, we will process your request on a best efforts basis. We will contact you if the purchase price is incorrect for the purchase date provided on the form before processing your request.

## 3. TO SEND A STOCK CERTIFICATE TO A CHARITABLE ORGANIZATION, COMPLETE THIS SECTION (EMPLOYEE STOCK PLAN ACCOUNTS MUST ALSO COMPLETE SECTION 5)

Register in the Name of		Tax ID Number of the Receiving Party (required)	
Ship to		Address	
Symbol	Number of Shares	Purchase Date	Purchase Price

Note: Due to SEC regulation, all paper certificate requests will be electronically transferred to the security's transfer agent via the Direct Registration System (DRS) in place of sending a paper certificate. You should contact the security's transfer agent in order to ensure your gift is forwarded to the charitable organization. To view additional information, visit [www.etrade.com/drs](http://www.etrade.com/drs).

**4. TO TRANSFER STOCK TO A CHARITABLE ORGANIZATION'S ACCOUNT AT ANOTHER BROKERAGE FIRM, COMPLETE THIS SECTION (EMPLOYEE STOCK PLAN ACCOUNTS MUST ALSO COMPLETE SECTION 5)**

Receiving Firm Name				Receiving Firm DTC Number			
Receiving Account Title				Receiving Account Number			
Symbol	Number of Shares	Purchase Date	Purchase Price	Symbol	Number of Shares	Purchase Date	Purchase Price
Symbol	Number of Shares	Purchase Date	Purchase Price	Symbol	Number of Shares	Purchase Date	Purchase Price
Symbol	Number of Shares	Purchase Date	Purchase Price	Symbol	Number of Shares	Purchase Date	Purchase Price

**5. EMPLOYEE STOCK PLAN ACCOUNTS: PLEASE ALSO COMPLETE THE FOLLOWING INFORMATION**

**EXERCISED SHARES**

Grant Type		Grant Date		Grant Number	
Symbol	Number of Shares	Purchase Date	Purchase Price		

**ESPP SHARES**

Symbol	Number of Shares	Purchase Date	Purchase Price
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**RESTRICTED STOCK**

Grant Type		Grant Date		Grant Number	
Symbol	Number of Shares	Purchase Date	Purchase Price		

**6. ACCOUNT HOLDER SIGNATURES**

I authorize E\*TRADE Securities LLC to transfer the securities or cash as listed above. I understand that upon receiving this form, E\*TRADE Securities will cancel any open orders that will affect the transfer.

X

Signature of Primary Account Holder Date

X

Signature of Co-Account Holder Date

Please print your name here

Please print your name here

The E\*TRADE Financial family of companies provides financial services that include trading, investing, and related banking products and services to retail investors. Securities products and services are offered by E\*TRADE Securities LLC, Member FINRA/SIPC. E\*TRADE Securities accounts are carried by an affiliate, E\*TRADE Clearing LLC, Member FINRA/SIPC. E\*TRADE Securities LLC and E\*TRADE Clearing LLC are separate but affiliated companies.