



# 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](#)
- 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	Symbol	Number of Shares
Symbol	Number of Shares	Symbol	Number of Shares
Symbol	Number of Shares	Symbol	Number of Shares

Note: If donating stock from an existing E\*TRADE account that is not an employee stock plan account, please note that the oldest shares held in the account for the symbol(s) indicated on the form are donated first.

## 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

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	Symbol	Number of Shares
Symbol	Number of Shares	Symbol	Number of Shares
Symbol	Number of Shares	Symbol	Number of Shares

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

**RESTRICTED STOCK\***

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

\*If additional space is needed to list Exercised Shares, ESPP Shares, or Restricted Stock for donation, please attach a signed letter of instruction including all details requested above, for each additional item listed.

**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. I am aware that the processing fee applicable to a partial transfer will be charged, and that to complete this transfer, my account must have funds available to cover the fee. To view processing fees, visit [www.etrade.com/fees](http://www.etrade.com/fees).

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 NYSE/FINRA/SIPC. E\*TRADE Securities LLC and E\*TRADE Clearing LLC are separate but affiliated companies.