



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

Include a [Fax Cover Sheet](#) when submitting documents by facsimile.

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Your E*TRADE Securities Account Number

CHARITABLE DONATION FORM

- Use this form to request a charitable donation from your individual, joint, trust, business stock plan, or IRA account.
- To make a charitable donation from your **retirement account** online, [click here](#). If you prefer to submit our request via paper, please attach an [IRA Distribution Form](#).
- To make a charitable donation from your **stock plan account** online, [click here](#).
- Please note that 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.
- You can upload this form online via documentupload.etrade.com
- Need Help? Send us a secure message through etrade.com or call 800-ETRADE-1.

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 THEN PROCEED TO PAGE 2)

Name of Charitable Institution	Receiving Account Number
Cash Amount to be Transferred	

3. TO SEND A STOCK CERTIFICATE TO A CHARITABLE ORGANIZATION (COMPLETE THIS SECTION THEN PROCEED TO PAGE 2)

Register in the Name of	Tax ID Number of the Receiving Party (required)
Ship to	Address

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.

4. TO TRANSFER STOCK TO A CHARITABLE ORGANIZATION'S ACCOUNT AT ANOTHER BROKERAGE FIRM (COMPLETE THIS SECTION THEN PROCEED TO PAGE 2)

Receiving Firm Name	Receiving Firm DTC Number	
Receiving Account Name(s)	Receiving Account Number	For further Credit Account (If applicable)

Please complete the Section that apply to the assets you want to donate.

5. ASSETS TO BE DONATED (WHOLE SHARES ONLY EXCEPT FOR MUTUAL FUNDS)

Transfer All Positions? Yes No **If No, provide the lot details below and the total stocks to transfer:**

Symbol	Number of Shares	Purchase Date	Price Paid
Symbol	Number of Shares	Purchase Date	Price Paid
Symbol	Number of Shares	Purchase Date	Price Paid

6. EMPLOYEE STOCK PLANS SHARES TO BE DONATED (WHOLE SHARES ONLY)

6A. ESPP SHARES

Transfer All ESPP Shares? Yes No **If No, provide lot details below and the total ESPP Shares to transfer:**

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

6B. RESTRICTED STOCK/PERFORMANCE GRANTS

Transfer All Grants? Yes No **If No, provide lot details below and the total RSU/PSU shares to transfer:**

Grant Type (RSU/PSU)	Grant Date	Grant Number	Vest Date
Symbol	Number of Shares	Estimated Cost Basis	

6C. EXERCISED SHARES

Transfer All Exercised Shares? Yes No **If No, provide lot details below and the total Exercised Shares to transfer:**

Grant Date	Grant Number	Exercise Date
Symbol	Number of Shares	Estimated Cost Basis

6D. OTHER STOCK PLAN SHARES (OSPS)

Transfer All OSPS Shares Yes No **If No, provide lot details below and the total OSPS Shares to transfer:**

Symbol	Number of Shares	Acquisition Date	Estimated Cost Basis
Symbol	Number of Shares	Acquisition Date	Estimated Cost Basis

7. 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 (MM/DD/YY)

X

Signature of Co-Account Holder Date (MM/DD/YY)

Please print your name here

Please print your name here

The E*TRADE Financial family of companies provides financial services including trading, investing and banking products and services to retail customers. Securities products and services are offered by E*TRADE Securities LLC, Member FINRA/SIPC.