

Gifts of Marketable Securities

Please use this form for donating marketable securities, such as stocks, mutual funds, bonds, etc. Securities will be liquidated and the proceeds will be deposited (less fees) in the referenced fund account.

United Charitable's Account Information:

Brokerage: TD Ameritrade
Account Name: United Charitable
DTC: 0188
Account Number: 862-336345

Additional Information:

- 1) Please have donor/s complete the form, "Donor Form for Gifting Marketable Securities" and have them sign and send it to us.
- 2) United Charitable will mail a receipt directly to the donor/s as soon as the gift is processed.
- 3) United Charitable will sell the securities within 7 days of receipt.

How the Value of the Securities is Calculated:

| | |
|---------------------------------------|---|
| For publicly traded securities | For publicly traded equities United Charitable will use the average of the high and low value on the date of transfer to determine fair market value (FMV). For Mutual Funds United Charitable will use the closing value on the date of transfer to determine the FMV. (Please include an activity page, if applicable) |
| For all other gifts | If the gift(s) is not publicly traded we require you to include an independent appraisal. The IRS requires the donor to include IRS form 8283 with their personal tax returns for the donation of non-cash gift items over \$500.00 in value. Please submit the completed IRS form 8283 to United Charitable for signature. |

Form for Gifting Marketable Securities

This form must be completed by the Donor when gifting marketable securities to a Donor Advised Fund (DAF), Active Charitable Program (Program) or to United Charitable to support its own charitable mission. This includes stocks, mutual funds, bonds, insurance policies, etc.

DAF or Program Information

Please provide the information about the fund to which you are donating.

DAF/Program Name:

DAF/Program #:

Donor Information

Donor Name:

Donor Address:

City:

State:

ZIP Code:

Telephone Number:

Email:

Confirmation of gift will be emailed.

Brokerage Account Information:

Where is the gift being sent? (United Charitable TD Ameritrade Account for liquidation or the investment currently open for your DAF)

☐ United Charitable's TD Ameritrade Account for liquidation ☐ DAF Investment Account

Brokerage: TD Ameritrade

Brokerage: _____

Account Name: United Charitable

Account Name: _____

DTC: 0188

Account Number: _____

Account Number: 862-336345

Item Being Donated

- 1) **Describe in detail the item being donated (how many shares, name, symbol, certificate number, policy number, etc.). Please review United Charitable's Policy for acceptance of Non-Cash Gifts at www.UnitedCharitable.org.**

For Stocks, Mutual Funds: # of Shares: _____ Ticker (symbol): _____

Other: _____

- 2) **When is the item being donated?** Date of transfer: _____

Value "Per Item" Calculated by United Charitable

| | |
|---------------------------------------|---|
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Total estimated value of gift(s): \$_____

Signature and Date

I authorize the verification of the information provided on this form as to my credit and employment. I have received a copy of this application.

| | | |
|------------------|-------------------|-------------|
| Signature: _____ | Print Name: _____ | Date: _____ |
|------------------|-------------------|-------------|

***Once completed, please fax form to (571) 248-3024 or email to accounting@unitedcharitable.org**