StockDonator

Stock Donations Made Secure, Fast, and Simple

Offline Stock Donation Form

Complete by hand or fill in this PDF without using the online donation form.

Return pages 1 and 2 by fax to (310) 382-2086 or email support@stockdonator.com. Choose how you will start the transfer below.

1 Donor and donation information

Donor name (as on the brokerage account)

Date of birth

Date

Email

Phone

Account type

☐ Individual ☐ Joint ☐ Other (trust, IRA)

Joint holder's full name (joint accounts only)

Mailing address (street, city, state, ZIP)

Recipient organization (full name)

Stock name / symbol

Number of shares

Purpose or designation (optional)

☐ I prefer to remain anonymous to the recipient organization.

2 Choose ONE transfer method

☐ I will instruct my brokerage to transfer the shares using the details below.

☐ I request transfer assistance from Stock Donator; I will also complete page 3.

Receiving brokerage	Fidelity Investments
DTC number	**0226**
Account name	Stock Donator, Inc.
Account number	**Z49-668052**
Brokerage address	Fidelity Investments, ATTN: TOA PO Box 770001, Cincinnati, OH 45277-0036
Brokerage phone	(800) 343-3548

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Fees, Terms and Signature

Every donor completes this page. Every account holder signs.

Return it with page 1. The full terms are at stockdonator.com/terms.

1 Fees

Donors pay no fee. The recipient organization pays Stock Donator 1.9% of the gift's sale value, with a $15.00 minimum, only when the gift is processed. It is deducted from the proceeds, together with any brokerage fees for the sale and the organization's payout fee, before the funds are sent.

2 Terms

- Your gift is binding. Once Stock Donator confirms that the transfer has started, you will take any further steps needed to complete it, and the recipient organization may enforce it.
- Share prices move. The value can change between the day you start the gift and the day Stock Donator receives the shares, which at some brokerages takes a few weeks. Stock Donator is not responsible for that gain or loss.
- Stock Donator records the date and value of each step of the gift. It does not give tax, legal or investment advice: ask your tax adviser which date and price apply to your deduction.

3 Signature

By signing below, you confirm the details on page 1 and accept the Stock Donator, Inc. terms and conditions at stockdonator.com/terms. For a joint account, every account holder signs.

Donor signature (sign by hand)

Date

Joint holder signature (joint accounts only)

Date

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Request Transfer Assistance

Optional: complete only if you selected transfer assistance on page 1.

Return all three pages by fax to (310) 382-2086 or email support@stockdonator.com. Do not include brokerage passwords or login details.

1 Identify your donation

Donor name(s), as on page 1

Recipient organization, as on page 1

2 Your brokerage account

Account name / title (all holders, as on your statement)

Account number

Brokerage name

Brokerage address

Brokerage phone

Brokerage fax

3 Authorization

I am authorized to direct transfers from the account identified above. I request that Stock Donator assist with starting the transfer of the shares described on page 1, and I authorize my brokerage to transfer those shares to the Stock Donator, Inc. account listed on page 1 for the recipient organization identified in this form. For a joint account, every account holder signs below.

Donor signature (sign by hand)

Date

Joint holder signature (joint accounts only)

Date