

# GIFT OF RAYMOND JAMES BROKERAGE ASSETS

(Only for assets held in your Raymond James brokerage account)

Please use this form to transfer assets held in your Raymond James brokerage account.

This form must be signed by all owners of the brokerage account.

**IMPORTANT:** Fax, email or mail this form to Raymond James Charitable. This form **must be accompanied by** a completed Application if establishing a new account. Please call 866.687.3863 with any questions.

\_\_\_\_\_  
Brokerage account name

\_\_\_\_\_  
Raymond James brokerage account number

\_\_\_\_\_  
Daytime phone number

**AS MY/OUR IRREVOCABLE GIFT TO THE RAYMOND JAMES CHARITABLE ENDOWMENT FUND, PLEASE TRANSFER FROM THE ABOVE ACCOUNT THE CASH OR SECURITIES LISTED BELOW TO THE RAYMOND JAMES CHARITABLE ACCOUNT #60137199 (OR #11192413 FOR POOLED INCOME FUND ACCOUNTS).**

**FOR FURTHER CREDIT TO** \_\_\_\_\_ (**#** \_\_\_\_\_)  
Raymond James Charitable Account Name Account #; Leave blank if new

Number of shares, principal amount of bond or cash amount	Name of security issuer	Symbol	Acquisition date(s)	Maturity date of bond
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____

\_\_\_\_\_  
Signature of donor and Raymond James account owner

\_\_\_\_\_  
Signature of co-donor and Raymond James account co-owner

\_\_\_\_\_  
Please print name

\_\_\_\_\_  
Please print name

\_\_\_\_\_  
Signature of branch manager

\_\_\_\_\_  
Daytime phone number of branch

\_\_\_\_\_  
Date

**RAYMOND JAMES® Charitable**

Trustee: Raymond James Trust // P.O. Box 23559 // St. Petersburg, FL 33742  
Phone: 866.687.3863 // Fax: 727.567.8040 // raymondjamescharitable.org // rjcharitable@raymondjames.com

Registration # CH11828

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE.

Under policies of Raymond James Charitable, and in accordance with the anti-money laundering regulations applicable to the financial institutions that provide financial services to Raymond James Charitable, we obtain, record, and may verify information that identifies each person and entity who establishes a fund within Raymond James Charitable, and other people and entities who contribute or have access to the fund established. Raymond James Charitable and Raymond James Trust, N.A., as its trustee, will ask for the name, address, Social Security number, date of birth, and other information that will allow us to identify people associated with the fund. We may also ask to see driver's licenses or other identifying documents, and we may verify the information obtained.