

Contribution Form Addendum

Brokerage Account #

Addendum must be submitted with signed [Contribution Form - 2783](#)

Account Details

Name of Raymond James brokerage account owner

Raymond James brokerage account number

RJ Charitable DAF Account Name

DAF Fund ID #

Transfer Details

If transferring a portion of a multi-tax lot position, your existing Cost Basis Accounting Method (CBAM) will be applied, unless otherwise specified. If specific tax lots are required, please allow up to 5 business days after transfer for the tax lot adjustment. If fractional shares of stock are contributed, we will round down to the whole number unless it is the entire position held in the account.

Number of Shares	Symbol	Security Name	Specific Tax Lot Date	Number of Shares	Symbol	Security Name	Specific Tax Lot Date