

# Contribution Form- IAD

**RAYMOND JAMES Charitable**

**RJ Charitable  
Service Center**  
*eSign / Scan / Fax*

**0 2 7 8 3**

Form #

Brokerage Account #

Advisor Firm #

Advisor Rep #

Speed Dial #

Accounts carried by Raymond James & Associates, Inc., Member New York Stock Exchange/SIPC

**IMPORTANT:** Publicly-traded securities held for one year or less are generally deductible at the lesser of cost basis or fair market value. Pledged accounts must have a release of assets noted in Scratchpad. The advisor should notify its personnel making investment decisions or any subadvisors of the specific shares to be contributed to pause trading prior to submitting this form. This form cannot be used for transfers from IRAs.

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

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

Name of Contributor Account Owner \_\_\_\_\_

Raymond James Account 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

Donor Fund ID #

**Asset Type:**  Entire Account

Cash (select one):  Full Balance or  Specific Amount: \$ \_\_\_\_\_

Utilize Margin?  Yes  No

Securities - If transferring a portion of a multi-tax lot position, a FIFO method will be used unless otherwise specified. 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. (Provide details below)

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

Additional shares may be contributed using [Contribution Form: Addendum](#).

**Are you submitting an addendum?**  Yes  No

**Move pending dividends/interest?**  Yes  No

**Is the representative listed above or any of the advisor's other associates related\* to anyone contributing to this account?**  Yes  No

\*The definition of related for the purposes of this question is spouse, ancestor, child, grandchild, great grandchild; spouses of a child, grandchild, and great grandchild; brothers and sisters (of whole or half-blood) and brothers' and sisters' spouses.

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

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

\_\_\_\_\_  
Please print donor's name

\_\_\_\_\_  
Please print co-donor's name

\_\_\_\_\_  
Branch Contact Name

\_\_\_\_\_  
Date

Please contact [RJCHARITABLE@RAYMONDJAMES.COM](mailto:RJCHARITABLE@RAYMONDJAMES.COM) or 866-687-3863 or ext. 77221 with any questions.  
Registration # CH11828

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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 service provider, 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.