

Contribution Form - IAD

RAYMOND JAMES Charitable

**RJ Charitable
Service Center**

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Form #

Brokerage Account #

Advisor Firm #

Advisor Rep #

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. Master Limited Partnerships (MLPs) and/or Publicly Traded Partnerships (PTPs) that generate unrelated business tax (UBIT) cannot be contributed.

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

Name of Raymond James brokerage account owner _____

AS AN 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 8969L918.

FOR FURTHER CREDIT TO _____ (# _____)
RJ Charitable DAF Account Name DAF Fund ID # (Required)

Is this the initial contribution to the account? ☐ Yes ☐ No

Asset Type: ☐ **Cash (select one):** ☐ Full Balance or ☐ Cash Amount: \$_____ The dollar amount is the cash you want transferred, NOT the amount the securities are worth.
Utilize Margin? ☐ Yes ☐ No

- ☐ **Securities** - 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

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.

It is the responsibility of the brokerage account owner to determine if the joint owner is required to sign.

Signature of Raymond James brokerage account owner _____

Signature of Raymond James brokerage account co-owner (if applicable) _____

Print owner name _____

Print co-owner name (if applicable) _____

Signature of Branch Manager/IAR Office Supervisor _____

Branch/Office Contact Name _____

Date _____

Please contact RJCHARITABLE@RAYMONDJAMES.COM or 866-687-3863 or ext. 77221 with any questions.

A copy of the official registration and financial information may be obtained from the division of consumer services by calling toll-free, within the state, 1.800.435.7352 (800.help.fl), or visiting floridaconsumerhelp.com. Registration does not imply endorsement, approval or recommendation by the state. Florida registration #CH11828.

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, 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.