

# Gift of Outside Assets

**RAYMOND JAMES Charitable**

**RJ Charitable  
Service Center  
Scan or Fax**

<b>0 2 7 8 8</b>	
Form #	FA #
Branch #	Speed Dial #

**Please use this form to notify Raymond James Charitable of assets you are transferring from an account outside of Raymond James. To initiate the transfer of assets, contact the outside financial institution directly to obtain required procedures and forms for transferring assets. Asset delivery instructions for your outside institution are below.**

Name of Donor \_\_\_\_\_ Date \_\_\_\_\_

Donor Street Address (if third-party contributor) \_\_\_\_\_ Donor City, State, Zip (if third-party contributor) \_\_\_\_\_

Are you an account holder with Raymond James Charitable?  Yes  No \_\_\_\_\_  
Social Security # (if third-party contributor) \_\_\_\_\_

**AS MY/OUR IRREVOCABLE GIFT TO RAYMOND JAMES CHARITABLE, PLEASE ACCEPT A TRANSFER OF CASH/SECURITIES LISTED BELOW TO RAYMOND JAMES CHARITABLE PURSUANT TO THE DELIVERY INSTRUCTIONS.**

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

Number of Shares	Name of security issuer	Symbol	Maturity date of bond
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

Name of Institution sending these assets to Raymond James Charitable \_\_\_\_\_

**Cash Wire Instructions**

Wire to: Bank of America, New York, NY  
ABA 026009593  
Raymond James Trust, N.A.  
Account Number: 4426322449  
REF: Daily requests  
FBO: RJ Charitable DAF#: [enter your account number]

**Delivery instructions for contributing Mutual Funds held outside Raymond James**

Bin# 60137199  
Dividends: cash  
Capital Gains: reinvest  
Tax ID#: 59-3652538  
Raymond James Charitable Endowment Fund  
FBO: RJ Charitable DAF#: [enter your account number]

**Delivery instructions for contributing Securities held outside Raymond James**

DTC-Eligible Securities  
Deliver to DTC Clearing 0725 - Raymond James & Associates  
Account Number: 60137199  
FBO: RJ Charitable DAF#: [enter your account number]

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

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 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.