

Gift of Outside Assets

RAYMOND JAMES Charitable

RJ Charitable
Service Center
SMARTForm ☒
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Form #

FA #

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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? ☐ Yes ☐ No

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 _____ (# _____)
RJ Charitable DAF Account Name DAF Fund ID# (leave blank if new)

Number of Shares	Name of Security	Symbol	Maturity Date of Bond
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

6. Cash Dollar Amount: \$ _____

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]

ACH Instructions to RJC DAF

Financial Institution: **Bank of America NA**
ABA Number: **111000012**
Account Number: **4426322449**
Account Type: **Checking**
Account Name: **RJC #******* (DAF Fund ID#)

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.