



Donating securities to the Forum Charitable Fund

From a Schwab brokerage account:

Complete "Move Assets from My Schwab Brokerage Account" form. The form is located on the web [HERE](#). To transfer cash, you will complete boxes 1 and 2. To transfer securities you will need to complete box 1 and 3. If you are donating cash AND securities, you will need to complete all 3 boxes. You can complete the form on the web but you must download and print the form so you can sign it. Once signed, scan the form and upload it to Schwab. Or you can print the form, sign it, and submit the signed form at the local Schwab office.

For a transfer of securities, you will need to specify the cost basis you would like to use before processing the transfer. We advise discussing this decision with your account executive or by calling Schwab's main number 1-800-435-4000 if you have no named account executive.

To complete boxes 2 and/or 3, you will need the Forum Charitable Fund's receiving account number and the name of the account.

Receiving Account Number: 7579-5251

In the Name of: Forum Charitable Fund

DTC Number: 0164

From a brokerage account NOT at Charles Schwab:

Please have your broker or custodian contact Schwab's Asset Transfer Services at 877-284-9830. They are available by phone Monday through Friday from 9:30am to 4:00pm EASTERN time. You will need the account information shown above (Receiving Account Number, In the Name Of, and DTC Number).