



DAF Form for Gifting Non-Cash Gifts

This form must be completed by the Donor when gifting marketable securities to a Donor-Advised Fund. This would include stocks, mutual funds, bonds, insurance policies, etc.

Donor-Advised Fund Information

Please provide the information about the DAF to which you are donating:

DAF Name: _____ DAF #: _____

Donor Information

Donor Name: _____

Donor Address: _____

City: _____ State: _____ Zip: _____

Telephone Number: _____ Email Address: _____

Preferred method of receiving gift confirmation: US Mail Email

Brokerage Account Information:

Where is the gift being sent? (United Charitable's TD Ameritrade Account for liquidation or the investment currently open for your DAF.)

United Charitable's TD Ameritrade Account for liquidation

DAF Investment Account

Brokerage: TD Ameritrade

Account Name: United Charitable

DTC: 0188

Account Number: 862-336345

Brokerage: _____

Account Name: _____

Account Number: _____

Item Being Donated

1) Describe in detail the item being donated (how many shares, name, symbol, certificate number, policy number, etc.). Please review our Policy for acceptance of Non-Cash Gifts at United Charitable.

For Stocks, Mutual Funds: # of Shares: _____ Ticker (symbol): _____

Other: _____

2) When is the item being donated? Date of transfer: _____

Value "per item" calculated by United Charitable

For publicly securities

For publicly traded equities United Charitable will use the average of the high and low value on the date of transfer to determine fair market value (FMV). For Mutual Funds United Charitable will use the closing value on the date of transfer to determine the FMV. (Please include an activity page, if applicable.)

For all other gifts

If the gift(s) is not publicly traded we require you to include an independent appraisal. The IRS requires the donor to include IRS form 8283 with their personal tax returns for the donation of non-cash gift items over \$500.00 in value. Please submit the completed IRS form 8283 to United Charitable for signature.

Total estimated value of gift(s): \$ _____

Signature and Date

Signature: _____ Print Name: _____ Date: _____