

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.

1. **DAF Name:** _____ **Account #:** _____

2. **Donor Name:** _____

Donor Address: _____

Donor Email: _____

Donor Telephone Number: _____

3. **Where are the funds coming:** United Charitable Gifting Account
 DAF Investment Account (Account # : _____)

4. **Describe in detail the item being donated (how many shares, name, symbol, certificate number, policy number, etc.) and total estimated value.**

Value "per item" calculated by United Charitable	
For publicly traded 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.

5. **DAF ADVISOR ATTESTATION:** All donations and payments become the sole property of United Charitable and are deemed fully relinquished.

Signature:	Date:	Phone #:
Print Name:	Email:	