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## CHARITABLE GIFT LOA TRANSFER OF ACCOUNT (ACATS - OUT DEPT)

Date: \_\_\_\_\_

Title of Scottrade Account: \_\_\_\_\_  
(Please Print)

Your Scottrade Account Number: \_\_\_\_\_

Relationship to Recipient: \_\_\_\_\_

Reason for This Request: \_\_\_\_\_

**Please gift the following:**

	shares of _____	stock
	shares of _____	stock
	shares of _____	stock

To (Account Title): \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Address (include city, state and zip code): \_\_\_\_\_

Contact Person: \_\_\_\_\_

At (Firm): \_\_\_\_\_

DTC Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

**Cost Basis**

If the securities you are transferring are part of a larger position that was purchased in multiple tax lots, the default method for determining which shares to transfer is First-In, First-Out (FIFO), unless you have previously specified a different global tax strategy that will implement another method. To specify the transfer of alternate shares, complete the section below.

Number of Shares	Acquired Date	Average Unit Cost

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I hereby agree to indemnify Scottrade, its affiliates, successors, assigns, officers, directors, agents, and employees, and hold them free and harmless from, and to promptly pay Scottrade upon demand for, any and all losses, liabilities, claims, damages, and costs (including reasonable attorney fees) or financial obligations that may arise as a result of Scottrade's reliance on the information provided in this document, and from acting upon instructions believed by Scottrade to have originated with me. This indemnity is in addition to, and no way limits or restricts any rights or responsibilities that have been made under any other agreement or agreements between me and Scottrade.



CC4201/6-13

X \_\_\_\_\_  
Account Holder's Signature Date

X \_\_\_\_\_  
Account Holder's Signature Date