



**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): _____  |                       |
| Contact Person: _____      |                       |
| At (Firm): _____           |                       |
| DTC Number: _____          | Account Number: _____ |

**X** \_\_\_\_\_ DATE \_\_\_\_\_  
ACCOUNT HOLDER'S SIGNATURE

**X** \_\_\_\_\_ DATE \_\_\_\_\_  
ACCOUNT HOLDER'S SIGNATURE

