



CHARITABLE GIFT LOA TRANSFER OF ACCOUNT

Date: _____

Title of Scottrade® Account: _____
(Please Print)

Your Scottrade® Account Number: _____

Relationship to Recipient: _____

Reason for This Request: _____

Transfer Type: Internal External

| | |
|---|-----------------------|
| Please gift the following: | |
| _____ shares of _____ | _____ |
| _____ shares of _____ | _____ |
| _____ shares of _____ | _____ |
| To (Account Title): _____ | |
| Social Security Number: _____ | |
| Address (including 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 |
|------------------|---------------|-------------------|
| | | |
| | | |

| Number of Shares | Acquired Date | Average Unit Cost |
|------------------|---------------|-------------------|
| | | |
| | | |

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.

X _____
Account Holder's Signature Date

X _____
Account Holder's Signature Date



CC4201/11-15

Signature Verification via Application Signature Page ID

Scottrade, Inc. - Member [FINRA](#) and [SIPC](#)

Associate Initials