

Recommend a Grant to a Charity



Questions or Need Assistance?

Call Schwab Charitable at 800-746-6216.

01

Donor-Advised Fund Account Information

Recommend a Grant Online at schwabcharitable.org.

Recommendations filled out online will be processed faster.

____ - ____

Donor-Advised Fund Account Number

02

Recommend a Charity

____ Charitable Organization's Federal Tax ID Number (if known)

Legal or Official Name of Charitable Organization

Mailing Address

Mailing City, State, Zip Code

Contact Name (if necessary)

Contact E-mail

____ - ____ - ____
Telephone Number

\$ _____

(minimum of \$50)

- Make this an anonymous grant.
- Include the following information in the acknowledgment:
 - The Account's special name (If you select this option, the name appears in the grant letter.)
 - The Account Holder's name(s)
How you wish your name(s) to appear in the letter:

 - The mailing address for the Account
- Additional information for the receiving charity (please note restrictions below):

- Additional information for Schwab Charitable staff:

- ____ If recommending a grant to a gala, tournament, auction, or other event, initial here to confirm that this grant will not pay for any portion of a ticket or other cost of admission to such event unless the total cost of such admission would be fully deductible as a charitable contribution.
- Note: Schwab Charitable may contact you to confirm this information. The Grant Award letter will include language to indicate the Account Holder's wish to waive any benefit associated with this grant.

03

Recommend Grant Amount and Specify Acknowledgment Options

I hereby certify that if this grant is distributed:

- It will not fulfill a pre-existing pledge to the recommended charity.
- Neither I nor any individual will receive any goods, services or other private benefit from the charitable organization as a result of this grant.
Note: Grants may not be used to provide any portion of admission to any charitable event, including fundraising dinners, concerts, auctions or other benefit functions when the Account Holder would receive a quid pro quo, such as the value of a dinner or the privilege to attend, that if received in return for a charitable contribution would reduce an Account Holder's charitable deduction.
- It will not be used for lobbying, political contributions or to support political campaign activities.
- I cannot deduct the grant as I have already deducted my gift to Schwab Charitable. I will disregard any tax receipt from the recommended charity.
- It will not support a private nonoperating foundation.
- It will not support a scholarship if any Account Holder or advisor to this Account (or any relative) is an eligible recipient or has a role in selecting the scholarship recipient.
- It will not support a specific missionary project of an individual who is related to me or any other Account Holders or advisors to this Account.
- Investment advisors, CPAs or other professional advisors also need to adhere to the following:**
 - In conveying this grant recommendation, I am acting as an agent for the Account Holder on this Account. I will maintain a record of the Account Holder's grant instructions and will provide a copy to Schwab Charitable upon request. I will not receive any compensation or personal benefit from Schwab Charitable for conveying the Account Holder's grant recommendation.

I understand that this grant recommendation will be subject to all the terms and conditions that apply to the Account, in accordance with Section 6 of the Program Policies.

Signature: Account Holder, Additional Account User, Investment Advisor Agent or Dual Professional Account Manager and Agent

____ / ____ / ____
Date

Name (Please print)

04

Delivery Instructions

Send this form via fax, mail or overnight delivery.

- Fax:** (877) 535-3852 **Please retain the original for your files.**
- Regular Mail:** Schwab Charitable P.O. Box 628298 Orlando, FL 32862
- Overnight Delivery:** Schwab Charitable 1958 Summit Park Dr. Suite 200 Orlando, FL 32810

Schwab Charitable is the name used for the combined programs and services of Schwab Charitable Fund, an independent nonprofit organization. Schwab Charitable Fund has entered into service agreements with certain affiliates of The Charles Schwab Corporation.