



# Letter of authorization

Use this form to allow Vanguard Charitable to initiate the transfer of assets from an outside brokerage firm. A separate *Letter of authorization* is required for each unique:

- (1) asset type,
- (2) account registration, and
- (3) firm.

If you require extra space, include additional sheets. Please do not staple.  
For more information, refer to our *Policies and guidelines* booklet.

Contact us  
with questions

donorservice@vanguardcharitable.org

## 1 Transfer of ownership instructions

*To the transfer agent or broker.* Your client is authorizing the transfer of ownership of the following assets to Vanguard Charitable. Securities should be transferred in-kind and should not be liquidated.

Only select **one** asset type. ►

<p><b>Vanguard mutual fund held at The Vanguard Group, Inc. (Vanguard) and/or Vanguard Brokerage Services (VBS)</b> Enter account registration and complete Section 1a. Review section 3 if assets are more than \$2 million.</p>
<p><b>Security held at Vanguard Brokerage Services (other than a Vanguard mutual fund)</b> Enter account registration and complete Section 1b. Review section 3 if assets are more than \$2 million.</p>
<p><b>Vanguard brokerage money market settlement fund</b> Enter account registration and complete Section 1c. Shares of the money market settlement fund will be liquidated and transferred as cash from your Vanguard Brokerage Account.</p>
<p><b>Physical Stock certificate</b> Complete Section 1d. A Medallion signature guarantee is required.</p>
<p><b>Mutual fund held outside Vanguard or Vanguard Brokerage Services</b> Enter account registration and complete Section 1e. A Medallion signature guarantee is required.</p>

### Account registration

Must match the information on file at the firm holding the assets.

Complete if assets are owned by a trust or organization. ►

<p><b>Gift from</b> <i>account number at firm holding the assets</i></p>	
<p><b>Name of trust/organization</b></p>	
<p><b>Taxpayer Identification Number</b> <i>last 4 digits</i></p>	<p><b>Trust agreement date</b> <i>mm-dd-yyyy</i></p>
<p><b>Name of owner/trustee/officer A</b> <i>salutation, first, middle initial, last</i></p>	
<p><b>Name of owner/trustee/officer B</b> <i>salutation, first, middle initial, last</i></p>	

**1a. Vanguard mutual fund held at Vanguard or Vanguard Brokerage Services**

To specify lots, complete these fields and enter shares below. ▶

Fund name	Ticker symbol	Number of shares or "All"

Specific ID cost basis method only

For additional lots, attach extra paper signed and dated by all registered owners. These pages should include the following: account number, fund name, and date shares acquired. ▶

Security/fund name		Ticker symbol	
	Number of shares	Date shares acquired	Purchase price per share
Lot 1			\$
Lot 2			\$
Lot 3			\$

Note: If you prefer to use specific identification for this transaction, but your account is using the average cost basis method, either by your affirmative election or Vanguard's default, you must change your cost basis method to specific identification in writing. Contact Vanguard for more information.

**1b. Security held at Vanguard Brokerage Services (i.e. stock, bond, ETF, non-Vanguard mutual fund)**

Gift to Vanguard Charitable brokerage account 76580331

To specify lots, complete these fields and enter shares below. ▶

Security/fund name	Ticker symbol	Number of shares or "All"	Approximate value
			\$
			\$
			\$

Specific ID cost basis method only

For additional lots, attach extra paper signed and dated by all registered owners. These pages should include the following: account number, fund name, and date shares acquired. ▶

Security/fund name		Ticker symbol	
	Number of shares	Date shares acquired	Purchase price per share
Lot 1			\$
Lot 2			\$
Lot 3			\$

Note: If you prefer to use specific identification for this transaction, but your account is using First In, First Out (FIFO) cost basis method, either by your affirmative election or Vanguard's default, you must change your cost basis method to specific identification in writing. Contact Vanguard for more information.

**1c. Vanguard brokerage money market settlement fund**

Dollar amount \$
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**1d. Physical Stock certificate**

Gift to Vanguard Charitable brokerage account 76580331

Reference our *Make a contribution* form for instructions on how to properly endorse the certificate.

Name of security	Number of shares

**1e. Mutual fund held outside Vanguard or Vanguard Brokerage Services**

Gift to Vanguard Charitable brokerage account 76580331

Receiving firm clearing number: 0062

Taxpayer ID: 23-2888152

Transfers in dollar amounts cannot be processed.

Number of shares	Fund name	CUSIP or ticker symbol	Mutual fund account number

**Delivering firm information**

Include with this form an account statement less than 90 days old from this firm.

Firm name		
Firm contact <i>salutation, first, last</i>		
Preferred phone		
Street address or P.O. box number		
City	State	Zip

For internal use only		
ACAT	Non-ACAT	Distributions in cash

## 2 Required signatures

By signing below, I authorize the transfer of the securities described in **Section 1** to Vanguard Charitable in accordance with the terms of this form. I hereby irrevocably relinquish all rights, title, and interest to the assets specified in **Section 1** to Vanguard Charitable, and understand that by requesting this transfer, I will be giving up full rights, ownership, and any and all claim to the assets. I hereby acknowledge that I have read and understand the terms of the transfer of assets I have requested and further acknowledge that the terms of this transfer are binding regardless of any other agreement I have with Vanguard Charitable. I confirm I have full authority to give this authorization.

If a Medallion signature guarantee is required for your contribution, do not sign unless you are in the presence of an authorizing officer. Signature dates must match Medallion signature guarantee.

### Owner/Trustee/Officer A

<b>Name</b> <i>first, middle initial, last</i>	<b>Social Security Number</b> <i>last 4 digits</i>
<b>Signature</b> X	<b>Date</b> <i>mm-dd-yyyy</i>

### Owner/Trustee/Officer B

<b>Name</b> <i>first, middle initial, last</i>	<b>Social Security Number</b> <i>last 4 digits</i>
<b>Signature</b> X	<b>Date</b> <i>mm-dd-yyyy</i>

## 3 Authentication

Additional authentication is required if you are contributing **assets valued at \$2 million or more at Vanguard**. Authentication for these assets must be completed using one of the following:

- (1) Vanguard voice verification™ or
- (2) Signature guarantee, or
- (3) Medallion signature guarantee.

Check this box if you intend to use Vanguard voice verification in lieu of signature guarantee. However, you must be enrolled in the service, which can take up to one week to complete. For more information or to register, contact your Vanguard representative.
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<b>Name of your Vanguard representative</b> <i>if known</i>
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A Medallion signature guarantee is required if you are contributing:

- (1) stock certificates, or
- (2) mutual fund shares held outside Vanguard

If you are using a Signature guarantee or Medallion signature guarantee, complete **Section 4**.

## 4 Signature guarantee

A Medallion signature guarantee is required to transfer the following assets to Vanguard Charitable:

- (1) stock certificates, and/or
- (2) mutual funds held at a firm other than Vanguard

All registered owners must be present for the Signature guarantee or Medallion signature guarantee. Some brokerage firms may require one guarantee for each signature on the form. Ensure with your bank or broker that the Medallion signature guarantee(s) provided will cover the amount of the gift.

A notary public cannot provide a Signature guarantee or Medallion signature guarantee.

Signature of authorized officer	Place stamp here
Authorized officer's title	
Name of institution	
Date <i>mm-dd-yyyy</i>	
<small>This applies to all signatures in Section 2.</small>	

### Return information

Return this form and required documentation to Vanguard Charitable. If the document has a Signature guarantee or Medallion signature guarantee, it must be mailed.

<b>Email:</b>	donorservice@vanguardcharitable.org <i>We recommend encrypting the form and sharing the password with us.</i>
<b>Phone:</b>	888-383-4483
<b>Fax:</b>	866-485-9414
<b>Mail:</b>	P.O. Box 9509 Warwick, RI 02889-9509
<b>Registered, certified or overnight mail:</b>	2670 Warwick Avenue, Warwick, RI 02889-9509