

# Donating Stocks and Investment Assets

## Overview

TODO

## Charles Schwab Equity Awards

1. Go to your [Equity Awards account](#)
2. Click the "Transfer Shares" link on the quick access panel
3. Select the symbol of share to transfer, then select "Gift to someone with a non-Schwab account". A list of your stocks will appear.
4. Set the quantities of individual stocks to transfer. Once you've selected your stocks, scroll down and fill out the form with the following information:

Receiving firm name

PNC

U.S.

Non-U.S.

Receiving firm phone number

855

-

762

-

4683

DTC number [i](#)


0226

Account information

Account number

005783575

Account registration

Organization 

Account holder name(s)

Prothaven

- Receiving firm name: PNC
- U.S.
- Receiving firm phone number: 855-762-4683
- DTC number: 0226
- Account number: 005783575
- Account registration: Organization

- Account holder name(s): Protohaven

Double- and triple-check the account number and DTC code. If these are incorrect, the shares may not transfer or transfer somewhere else!

5. Fill out the remaining (personal) information on the submission form, then click "Submit". You'll have one final chance to confirm everything, like so:

1. Setup	2. Review	3. Acknowledgement
By submitting this request, you're authorizing Schwab to transfer shares from your EAC account. Please review your request. If correct, select the Submit button. You can also Edit or Cancel your request.		
Symbol	GOOG	
Transfer shares method	Gift to someone with a non-Schwab account	
Name of the receiving firm	PNC	
Receiving firm phone number format	US	
Phone number for the receiving firm	855 - 762 - 4683	
DTC number ⓘ	0226	
Account number	... 575	
Account registration	Organization	
Account holder name	Protohaven	
Your daytime phone number format	US	

If it all looks good, click "Submit". Make sure to write down the confirmation number for your records in case there's an issue with the transfer.

Revision #1

Created 10 March 2026 13:52:43 by Manager Scott Martin

Updated 8 July 2026 12:44:12 by Manager Scott Martin