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 quanitities 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

0226

Account information

Account number

005783575

Account registration

Organization

Account holder name(s)

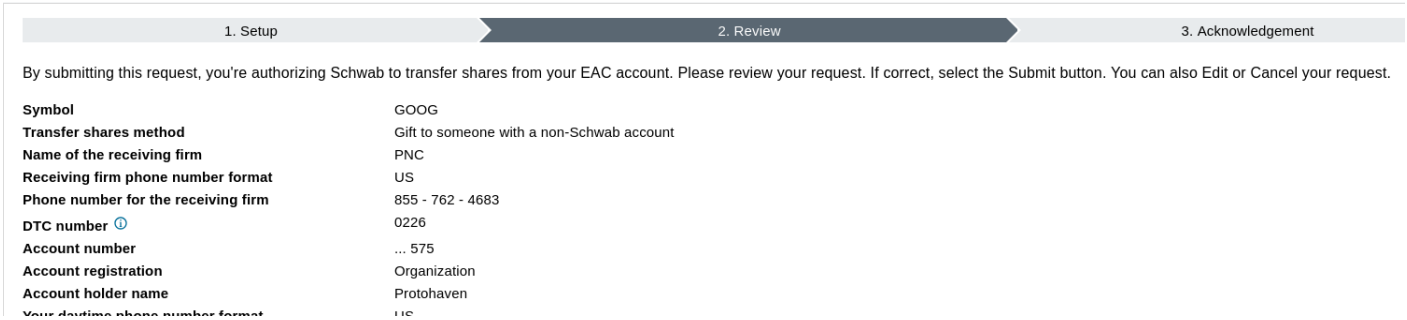
Protohaven

- 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.

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