

**Form purpose:**

- Make a contribution of mutual funds or securities via a transfer to a T. Rowe Price Charitable account.
- Provide instructions to the transferring institution.

**Mail form to:**

T. Rowe Price Charitable  
P.O. Box 17115  
Baltimore, MD 21297-1115

**Expedite by fax:**

800-619-9262

**Questions?**

800-690-0438

[Questions@trowepricecharitable.org](mailto:Questions@trowepricecharitable.org)

## 1 T. Rowe Price Charitable Account Information

<b>Donor Name(s)</b>	
<b>Account Name</b>	<b>Account Number (if available)</b>

## 2 Asset Transfer Information

Tell us where you are transferring your assets from and provide the asset information. The transfer will be based on the cost basis method you have on file with the transferring institution. **Check one:**

- Transfer assets from my T. Rowe Price mutual fund or Brokerage account.** Send this form to T. Rowe Price Charitable. A signature guarantee is not required.
- Transfer assets from an institution other than T. Rowe Price.** The delivering firm may require a signature guarantee on this form and/or the use of their own form to process your gift. Please contact the delivering firm to confirm.
  - Brokerage account assets.** Send this original signed form to the delivering firm so that they can initiate the transfer. Section 3 provides delivery instructions for the delivering firm. Notify T. Rowe Price Charitable of your pending gift by sending us a copy of this form, calling, or entering it online.
  - Mutual fund(s) (if the delivering firm CANNOT initiate the transfer).** Send this original signed form to T. Rowe Price Charitable with a recent account statement. T. Rowe Price Charitable will initiate the transfer.
- Transfer agent.** Contact the transfer agent to determine the requirements for a transfer request. Return this form along with any forms required by the transfer agent to T. Rowe Price Charitable.
- Security stock certificates.** Endorse the physical certificate(s) to the T. Rowe Price Program for Charitable Giving (our legal name). Send the certificate(s) and this form via registered, certified, or overnight delivery to: T. Rowe Price Charitable, Attention: Securities Processing, 4515 Painters Mill Road, Owings Mills, MD 21117-4903. Please complete the table below using account number 30B806286.

<b>Delivering Firm Name</b>	<b>Contact Name (if applicable)</b>	<b>Phone</b>
<b>Name(s) on Account</b>		

Provide the asset information to be transferred.

Account Number	Fund Name/Security Name/Ticker Symbol/Certificate Number	Shares	Cost Basis/Specific Shares

For gifts of long-term appreciated securities, the value of your stock determined by T. Rowe Price Charitable for charitable contribution purposes will be the average market value of the securities on the day T. Rowe Price Charitable receives them in good order. For gifts of mutual funds, the value determined by T. Rowe Price Charitable for charitable contribution purposes is based on the closing net asset value on the day the contribution is received. All non-government money market shares will be redeemed and applied as a cash donation. The amount invested in your account is the proceeds from the sale of the securities minus the brokerage commission and all other applicable fees.



### 3 Delivery Instructions

**To the delivering firm:** Please accept this authorization for a gift transfer to the T. Rowe Price Program for Charitable Giving. Securities should be transferred in kind and not liquidated.

**Receiving firm name:** Pershing LLC

**Brokerage account number:** 30B806278

**DTC number:** 0443

**Further credit to:** (your T. Rowe Price Charitable account number and name)

### 4 Investment Pool Recommendation

Provide your investment pool recommendation. If no allocation is provided, T. Rowe Price Charitable will use its discretion based on contribution history, current allocation, and minimum balance requirements.

Gift Preservation Pool	%
U.S. Bond Index Pool	%
Income Pool	%
Conservative Growth Pool	%
Moderate Growth Pool	%
Growth Pool	%
Aggressive Growth Pool	%
U.S. Equity Index Pool	%
International Equity Index Pool	%
Global Impact Equity Pool	%
<b>Total Assets:</b>	%

### 5 Signatures

**This section must be signed by all registered owners of the assets to be donated. Please follow the additional instructions in Section 2 prior to submitting this form.**

- I hereby irrevocably and unconditionally transfer ownership of the assets listed on this form to T. Rowe Price Charitable, and I understand that it will not be refunded to me in any manner.
- Furthermore, I make the donation with the full understanding of my role as donor-advisor and acknowledge that T. Rowe Price Charitable's Board of Directors has complete control over the investments of my donation and its uses for charitable purposes.
- I also acknowledge that I have read completely T. Rowe Price Charitable's policies and charitable registration disclosures as included in T. Rowe Price Charitable's printed material and on its website.

Donor-Advisor	Donor-Advisor (if applicable)
<b>Date (mm/dd/yyyy)</b>	<b>Date (mm/dd/yyyy)</b>
✍️ X	✍️ X

Signature Guarantee (if required by the delivering firm / not required for T. Rowe Price accounts)

**Medallion Signature Guarantee — Place Medallion Stamp Below**

You can obtain the Medallion signature guarantee from most banks, savings institutions, or broker-dealers. We cannot accept guarantees from notaries public or non-Medallion guarantors. The level of coverage provided by the guarantor's stamp must cover the dollar amount of the transaction or it may be rejected.

