

# Charitable Donations

## Donating Shares on etrade.com

To get started donating your shares, go to the [Charitable Donations](#) page on etrade.com and follow the steps on the screen. You can also follow this step-by-step guide for detailed instructions.

- Once logged on, in the **At Work** portion of your account, (1a) click on **Donate Shares** at the bottom of the **My Account** page

OR

- If you do not have an At Work portion, hover over the (1b) **Pay & Transfer** tab found on the navigation bar then select (1c) **Charitable Donations**.

1a

1b

1c

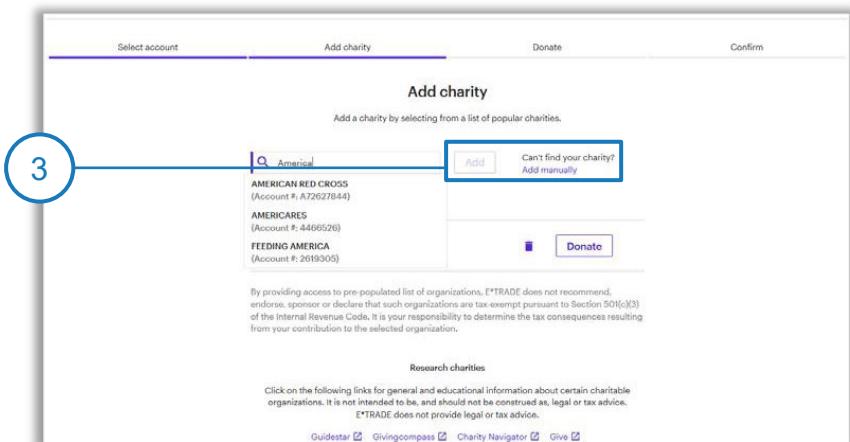
- Click **Select** next to the account from which you would like to donate

- NOTE:** If there are multiple eligible accounts, each eligible account will be shown. You can only select one at time, provided there are shares available to donate.

2

## Contributing Your Shares on etrade.com

3. Next, search for the name of the charity and save as a favorite by clicking **Add**, or (3b) manually enter the charity information if it is not found.



3

Select account Add charity Donate Confirm

Add charity

Add a charity by selecting from a list of popular charities.

American

**Add** **Can't find your charity? Add manually**

AMERICAN RED CROSS  
(Account # A72627844)

AMERICARES  
(Account # 4466526)

FEEDING AMERICA  
(Account # 2019305)

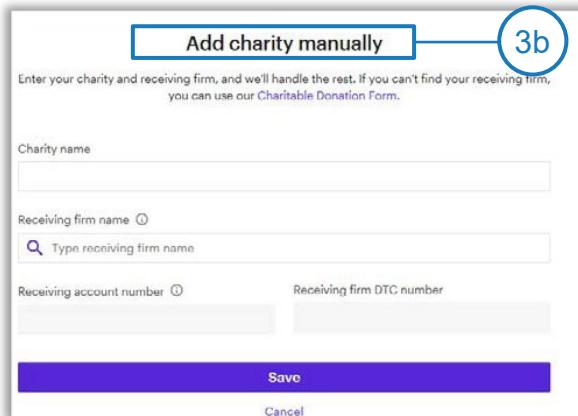
**Donate**

By providing access to pre-populated list of organizations, E\*TRADE does not recommend, endorse, sponsor or declare that such organizations are tax exempt pursuant to Section 501(c)(3) of the Internal Revenue Code. It is your responsibility to determine the tax consequences resulting from your contribution to the selected organization.

Research charities

Click on the following links for general and educational information about certain charitable organizations. It is not intended to be, and should not be construed as, legal or tax advice. E\*TRADE does not provide legal or tax advice.

GuideStar  Givingcompass  Charity Navigator  Give



3b

Add charity manually

Enter your charity and receiving firm, and we'll handle the rest. If you can't find your receiving firm, you can use our Charitable Donation Form.

Charity name

Receiving firm name  ⓘ

Type receiving firm name

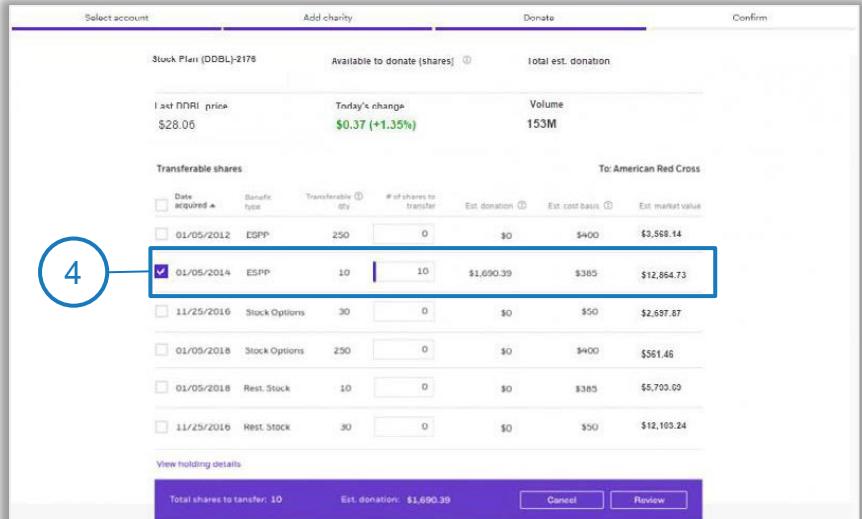
Receiving account number  ⓘ

Receiving firm DTC number

**Save**

**Cancel**

4. Choose a row or enter a quantity from the list of transferable shares; multiple selections are possible.



4

Select account Add charity Donate Confirm

Stock Plan (DDBL)-2178 Available to donate (shares) ⓘ Total est. donation

Last DDBL price Today's change Volume

\$28.06 \$0.37 (+1.35%) 153M

Transferable shares To: American Red Cross

Date acquired	Benefit type	Transferable qty	# of shares to transfer	Est. donation	Est. cost basis	Est. market value
01/05/2012	ESPP	250	0	\$0	\$400	\$3,599.14
<input checked="" type="checkbox"/> 01/05/2014	ESPP	10	10	\$1,690.39	\$385	\$12,864.73
11/25/2016	Stock Options	30	0	\$0	\$50	\$2,597.87
01/05/2018	Stock Options	250	0	\$0	\$400	\$561.46
01/05/2018	Rest. Stock	10	0	\$0	\$385	\$5,703.00
11/25/2016	Rest. Stock	30	0	\$0	\$50	\$12,103.24

**View holding details**

Total shares to transfer: 10 Est. donation: \$1,690.39 **Cancel** **Review**

## Contributing Your Shares on etrade.com

5. Review the donation. If something needs to be revised, click Cancel or select **Confirm** to advance.

Type	Symbol	# of shares	Est. cost basis	Est. donation
ESPP		30	\$400	\$5,081.70
ESPP		50	\$385	\$1,690.39
Total estimated donation amount				\$6,772.09

You may be able to deduct your charitable donation from your taxable income. However, the amount you can deduct (if any) depends on the recipient organization's status as a tax-exempt organization, your income during the donation year, the state you live in, whether you itemize deductions, and how long you've owned the shares you're donating. Make sure you speak to an attorney or tax professional about your specific situation.

By clicking on "Confirm", I authorize E\*TRADE Securities to immediately transfer the above listed security(s) from my E\*TRADE account to the designated individual or charitable organization listed above. Shares will be transferred in kind and are not to be liquidated. I hereby release and discharge E\*TRADE and its affiliates from any liability or claims in connection with the aforementioned instructions and agree to indemnify and hold E\*TRADE harmless against any losses from any action, claim, or demand of any person based upon E\*TRADE acting under these instructions.

**Confirm** **Cancel**

6. You're all set! **Note the case number** to track the progress of the donation through the customer service feature.

✓ Thank you!

Your donation request has been received.

Please allow a few days for the receiving charity to process your donation. You can check the details of the request (Reference number: 221877531131) or go to your Stock Plan account.

[Make another donation](#)

## Have Questions?

Visit <https://us.etrade.com/contact-us> to contact us via phone (24 hours a day, weekdays) or by secure chat. From outside the US, visit etrade.com/contact for your country's toll-free number or by secure chat.

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