

UPDATE CHARITABLE GIFT ACCOUNT INFORMATION



SCHWAB CHARITABLE FUND™

101 MONTGOMERY STREET SAN FRANCISCO, CA 94104

FAX 415-989-1047

QUESTIONS? CALL 1-800-746-6216

www.schwabcharitable.org

Current Account Number	Current Account Name
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SELECT ALL THAT APPLY

Note: An account Donor may use this form to update Sections 1–4, while an account Nominator may use this form to update Section 3 only.

- Change account name: Complete Sections 1 and 5.
- Update Donor or Nominator information: Complete Sections 2 and 5.
- Change Portfolio Allocation: Complete Sections 3 and 5.
- Recommend an Investment Advisor to manage your account through the Charitable Asset Management feature (only available for accounts with a minimum balance of \$250,000): Complete Section 3.
- Select individuals to receive account correspondence: Complete Sections 2 and 5.
- Change designated Successors or recommended charitable beneficiaries of the Charitable Gift Account: Complete Sections 4 and 5.

1 CHANGE ACCOUNT NAME

Note: For legal reasons you may not use the word "Foundation" or "Trust" in the account name; you may use the word "Fund" or "Endowment."

New Account Name (maximum 45 characters)
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2 UPDATE DONOR OR NOMINATOR INFORMATION

DONOR INFORMATION (Up to four. If necessary, please make a photocopy of this sheet and attach.)

- Add New Donor Update Donor Address/Phone Remove Donor* (Only name required)
- Mr. Mrs. Ms. Miss Dr.

Name (First)	(Middle)	(Last)
Mailing Address (P.O. Box may be used)		
City, State, Zip Code		
Home Telephone Number ()	Business Telephone Number ()	
Date of Birth (mm/dd/yyyy)	Social Security Number	
Email Address		

Please check here if you would like the new Donor to receive duplicate copies of account correspondences. This option only applies if donors are at separate addresses.

* Note: The Donor must consent to removal by signing this form, except in cases of the Donor's death or where the Donor has been determined to be disabled.

NOMINATOR INFORMATION (Up to two. If necessary, please make a photocopy of this sheet and attach.)

- Add New Nominator Update Nominator Address/Phone Remove Nominator (Only name required)
- Mr. Mrs. Ms. Miss Dr.

Name (First)	(Middle)	(Last)
Company Name (if applicable)		
Mailing Address (P.O. Box may be used)		
City, State, Zip Code		
Home Telephone Number ()	Business Telephone Number ()	
Date of Birth (mm/dd/yyyy)	Social Security/Tax ID Number	
Email Address		
Advisor's Master Account Number (if applicable)		

Please check all boxes that apply.

A) Please have the new Nominator receive duplicates of acknowledgements for grants they have recommended, account statements and annual contribution summaries.

B) The new Nominator is an Investment Advisor, CPA or other professional:
 that I have designated on my Charles Schwab & Co., Inc. account(s).
 Advisor's Master Account Number(s)*: _____
 that is not designated on my Charles Schwab & Co., Inc. account(s).

C) Only link account to Advisor's Master Account with no Nominator privileges. Advisor's Master Account Number(s)*: _____

* Only for advisors working with Schwab Institutional®, a division of Charles Schwab & Co., Inc.

† Each Nominator of an account has the authority to recommend grants and the rebalancing of investment pools. If adding an Investment Advisor, please list only the firm name and not the individual advisor.

3 RECOMMEND INVESTMENTS

Recommend a portfolio allocation (option A), OR recommend a participating investment advisor for active portfolio management via the Charitable Asset Management feature (option B).

A. INVESTMENT POOLS

Please indicate your recommended Portfolio Allocation, which is used for investing your contributions into the Charitable Gift Account investment pools as well as liquidating the investment pools to fulfill grant requests.

Note: You may change your portfolio allocation at any time through the secure online Donor Center at www.schwabcharitable.org.

OR:

B. CHARITABLE ASSET MANAGEMENT

Charitable Asset Management is available only through Investment Advisors working with Schwab Institutional®, a division of Charles Schwab & Co., Inc. While donors may recommend an advisor, the Fund must approve the recommendation. Advisors must meet certain eligibility requirements and adhere to the Fund's fee and investment guidelines.

RECOMMEND AN INVESTMENT ADVISOR FOR YOUR ACCOUNT

Important: Minimum Charitable Gift Account balance of \$250,000

Advisory Firm Name		Contact Person	Direct Phone Line
Federal Tax ID Number (if known)	Master Account Number		
Mailing Address			
City, State, Zip Code			
Telephone Number ()			

Note: A Money Market Fund will be added to your Charitable Gift Account, so that money set aside for near-term granting will be invested, but is available to be promptly liquidated for granting.

4 CHANGE DESIGNATED SUCCESSOR(S)

Donors have the option of either (1) naming up to four individuals to succeed them as Donor-Advisors of the account, (2) nominating charitable organizations to receive the remaining proceeds, or (3) naming Schwab Charitable Fund's Philanthropy Fund as the beneficiary upon the death, incapacity or other disqualification of ALL Donors of the account.

Choose either option A, B or C. Please note: This selection will override any previous selections.

A. NAME INDIVIDUAL(S) AS SUCCESSOR(S)

You may name individuals to succeed you with full privileges as Donor-Advisors in accordance with the choices below.

Successor #1

Mr. Mrs. Ms. Miss Dr.

Name (First) (Middle) (Last)	
Mailing Address (P.O. Box may be used)	
City, State, Zip Code	
Home Telephone Number ()	Business Telephone Number ()
Social Security Number	Date of Birth (mm/dd/yyyy)
Relationship to Donor(s)	

Successor #2

Mr. Mrs. Ms. Miss Dr.

Name (First) (Middle) (Last)	
Mailing Address (P.O. Box may be used)	
City, State, Zip Code	
Home Telephone Number ()	Business Telephone Number ()
Social Security Number	Date of Birth (mm/dd/yyyy)
Relationship to Donor(s)	

Please select one of the following options to determine how Successor(s) may become Successor Donor-Advisors(s) upon the death, incapacity or other disqualification of all Donors of the account.

- Successor(s) named above succeed(s) to the account with full privileges as Donor-Advisor(s).
- Successor #1 named above succeeds to the account with full privileges as Donor-Advisor. Successor #2 is a Contingent Successor, and succeeds to the account only upon the death, incapacity, refusal to serve or other disqualification of Successor #1 (and other named Successors as applicable).

INVESTMENT POOLS	Select among the seven pools:	% OF TOTAL (whole numbers only)
	Money Market Pool	_____
	Intermediate Income Pool	_____
	Balanced Pool	_____
	Equity Income Pool	_____
	Equity Value Pool	_____
	Equity Index Pool	_____
International Pool**	_____	
TOTAL	Must equal 100%	

** Due to risk, the Fund discourages the use of this pool for more than 25% of any Charitable Gift Account balance

SECTION 4 CONTINUED ON NEXT PAGE

