



8834 N. Capital of Texas Hwy.
Suite 240
Austin, TX. 78759

Phone: 512.553.2001
E-Mail: info@switchenergyalliance.org

Donation of Stock or Securities

Thank you for supporting Switch Energy Alliance (SEA) with a donation of stock or securities.

Donor Information (for receipting and identification purposes)

Name of Account Owner (Full Name or Company Name)

Address

City / State / Zip Code

Preferred Phone Number

E-Mail Address

Broker Information / Delivering Institution

Name of Company or Firm

Name of Broker

USD DTC

Phone Number

E-Mail Address

Security Details (attach additional page(s) if required)

Donor Account #

Date of Transfer

Name of Security

of Shares / Units CUSIP / Fund

Name of Security

of Shares / Units CUSIP / Fund

Name of Security

of Shares / Units CUSIP / Fund

Donation Designation (attach additional page(s) if required)

Name of Fund or Purpose of Donation

Authorization

I hereby authorize and direct the transfer of the securities listed above from my account to Switch Energy Alliance, as a donation in-kind.

Donor Signature

Date

All securities will be sold immediately upon receipt by Switch Energy Alliance; net proceeds will fund the donation designation stated above. In accordance with United States regulations and SEA policy, a receipt for income tax purposes will be issued using the average of the high and low trading prices of the securities on the day the securities are received by SEA.

For year-end tax planning purposes, allow 2-3 weeks for settlement of all securities.

Switch Energy Alliance collects donor information to process charitable contributions, maintain donor records, and communicate about our educational mission and engagement opportunities. Personal information is maintained in accordance with applicable U.S. privacy and nonprofit regulations and will not be sold or shared with third parties except as required to process donations.

Privacy Notice: The information provided on this form will be used by Switch Energy Alliance to process your donation and maintain donor records. Your information will be kept confidential and will not be sold or shared with third parties except as necessary to process your gift.

INSTRUCTIONS

1. To make a donation of securities to Switch Energy Alliance, have your broker / financial adviser / banker forward this completed form to their back office for processing and delivery of the securities to SEA's custodian / broker.

SEA CANNOT INITIATE THE TRANSFER

2. If you operate a self-directed investment account, forward this completed form directly to that firm, or speak to a representative at the nearest branch of your firm's bank.

Forward a copy of this completed form to Switch Energy Alliance (or ask your broker to do this): e-mail: info@switchenergyalliance.org

This will ensure a receipt for income tax purposes is issued and funds are allocated as intended.

SWITCH ENERGY ALLIANCE RECEIVING INSTITUTION

STOCKS AND BONDS

ACCOUNT #: TEP011967

ACCOUNT NAME: Switch Energy Alliance

USD STOCKS AND BONDS: DTC: 0443

COMMENT: [name of donor]

PHYSICAL CERTIFICATES

For instructions, e-mail: info@switchenergyalliance.org

Switch Energy Alliance
US / IRS:81-4309125