

DO NOT use this form if requesting a tax-free charitable contribution from your IRA. Instead, use the *Required Minimum Distribution (RMD) Request* available on our website, americanfunds.com, or from your advisor.

Donor instructions

Use this form to give shares from your American Funds account as a gift to a charitable organization.

Complete Sections 1–3, as applicable, then send this form to the recipient for acceptance, certification of taxpayer identification number and instructions for disposition of shares.

- Any tax questions resulting from this transfer or redemption of securities should be directed to your tax advisor. Enter the information exactly as it appears on your existing American Funds account statement.
- Since the transfer of shares does not result in a sale of securities, the donor may not incur a taxable event; however, a gift tax may be applicable. Consult your tax advisor before making the transfer.
- If you are holding stock certificates for shares involved in this transfer, return them with this form. Without them, we will not be able to transfer the shares. You may wish to send the certificates back by registered or certified mail. **DO NOT** sign the certificates.

Recipient instructions

You are being given shares of mutual funds in the American Funds as indicated below.

Complete Sections 4–8, as applicable, and return the form to the appropriate American Funds Service Company location listed on page 4.

- Call our Shareholder Services Department at **(800) 421-4225** if you have questions about the fund(s) or need help completing this form.
- Any tax questions resulting from this transfer or redemption of securities should be directed to your tax advisor.
- Attach a copy of the 501(c)(3) federal determination letter verifying the organization is tax exempt **OR** government-issued document verifying the existence of the business.

1 Donor account information

Enter the fund name exactly as it appears on the account statement that you are using to make the gift.

Account number	Fund name		()	Ext.
Account name (exactly as it appears on the account registration)			Daytime phone	
Address	City	State	ZIP	

2 Gift transfer of shares instructions

For fund names or numbers, contact your financial advisor or visit americanfunds.com.

Fund name or number	Amount	OR	Number of shares	OR	Percentage
	\$ _____	OR	_____	OR	_____%
	\$ _____	OR	_____	OR	_____%
	\$ _____	OR	_____	OR	_____%
	\$ _____	OR	_____	OR	_____%
Total \$		OR			

3 Donor authorization and signature guarantee

Authorize the transfer of shares here. For your protection, transfers from your account to others are not available unless this section is completed.

Note: Additional documentation may be required for transfers of shares held in corporate, partnership or authorization fiduciary accounts. Please call us for more information.

Name of owner (print)

X
Signature of owner

Date / /
(mm/dd/yyyy)

Name of co-owner, if applicable (print)

X
Signature of co-owner

Date / /
(mm/dd/yyyy)

A signature guarantee is required and must be performed by a bank, savings association, credit union, member firm of a domestic stock exchange or the Financial Industry Regulatory Authority, that is an eligible guarantor institution. **A notary public is NOT an acceptable guarantor.** The guarantee must be in the form of a stamp or a typewritten or handwritten guarantee that is accompanied by a raised corporate seal.

GUARANTOR: Stamp signature guarantee here.

GUARANTOR: Stamp signature guarantee here.

4 Recipient account information

Please complete either **A** or **B** in this section.

A. Our charitable organization **currently has an account** with American Funds registered as indicated below. The shares should be transferred to this existing account.

Account number

Fund name

Account name (exactly as it appears on the account registration)

Tax identification number (required by law)

Address of entity (physical address required — no P.O. boxes)

City

State

ZIP

OR

B. Our charitable organization **does not have an account** with American Funds. The account should be registered as follows and the shares transferred to this account.

Name of charitable organization

Tax identification number (required by law)

Address of entity (physical address required — no P.O. boxes)

City

State

ZIP

Note: Attach a copy of the 501(c)(3) federal determination letter verifying the organization is tax exempt **OR** government-issued document verifying the existence of the business.

5 Recipient instructions

Provide instructions for the donated shares.

Hold all shares on deposit until further notice.

Note: Shares will automatically be deposited into the account unless otherwise requested.

Redeem shares as indicated below and send the check to the address of record as indicated in Section 4.

Note: A signature guarantee in Section 7 and additional documentation may be required for redemptions exceeding \$125,000. Call us at **(800) 421-4225** for more information.

Redeem \$ _____ and hold remaining shares on deposit.

Redeem _____ shares and hold remaining shares on deposit.
(number of)

Redeem all shares.

6 Recipient account owner signatures and certification

Authorize acceptance of the shares and redemption, if applicable, here.

By the authorized signature(s) below, the charitable organization listed in Section 4 accepts the gift of transferred shares, authorizes the redemption requested in Section 5 (if applicable) and certifies under penalty of perjury that:

1. the Social Security or Taxpayer Identification Number shown in Section 4 is correct;
2. the IRS has never notified me that I am subject to backup withholding or has notified me that I am no longer subject to such backup withholding;
3. I am a U.S. citizen or a legal U.S. resident; and
4. the entity is exempt from FATCA reporting (if applicable).

Check this box if you are subject to backup withholding and cannot certify to item 2 above.

NOTE: The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

I understand that information provided on this application will be used to verify the charitable organization listed in this document. For example, the organization may be verified through the use of a database maintained by a third party. If American Funds Service Company is unable to verify this information, I understand it may need to take action, possibly including closing the account and redeeming the shares at the current market price and that such action may have tax consequences, including a tax penalty.

X

Authorized signature representing the charitable organization listed in Section 4

Date / / (mm/dd/yyyy)

X

Authorized signature representing the charitable organization listed in Section 4 (if applicable)

Date / / (mm/dd/yyyy)

7 Recipient signature guarantee

Complete this section **ONLY** if you have chosen to redeem donated shares in an amount exceeding \$125,000.

If a signature guarantee is required, the guarantee must be performed by a bank, savings association, credit union, member firm of a domestic stock exchange or the Financial Industry Regulatory Authority, that is an eligible guarantor institution. **A notary public is NOT an acceptable guarantor.** The guarantee must be in the form of a stamp or a typewritten or handwritten guarantee that is accompanied by a raised corporate seal.

X _____ Date / /
Authorized signature representing the charitable organization (mm/dd/yyyy)

X _____ Date / /
Authorized signature representing the charitable organization (if applicable) (mm/dd/yyyy)

GUARANTOR: Stamp signature guarantee here.

GUARANTOR: Stamp signature guarantee here.

8 Recipient advisor information

We authorize American Funds Service Company (AFS) to act as our agent for this account and agree to notify AFS of purchases made under a Statement of Intention or Rights of Accumulation.

Name (exactly as it appears on firm's registration) Advisor ID number Branch number () Ext. _____
Daytime phone

Branch address City State ZIP - _____

Name of broker-dealer firm (as it appears on the Selling Group Agreement) **X** _____
Signature of person authorized to sign for the broker-dealer

Please mail this form to the appropriate service center.
(If you live outside the U.S., mail the form to the Indiana Service Center.)



Indiana Service Center
American Funds Service Company
P.O. Box 6007
Indianapolis, IN 46206-6007
Overnight mail address:
12711 N. Meridian St.
Carmel, IN 46032-9181



Virginia Service Center
American Funds Service Company
P.O. Box 2280
Norfolk, VA 23501-2280
Overnight mail address:
5300 Robin Hood Rd.
Norfolk, VA 23513-2430

Call from anywhere in the U.S., 8 a.m. to 8 p.m. Eastern time: (800) 421-4225. Calls may be recorded or monitored for verification, recordkeeping and quality-assurance purposes.