

- Do not use this form for Capital Bank and Trust Company<sup>SM</sup> (CB&T) retirement accounts.
- To gift shares to a charitable organization, use the *Gift Transfer of Shares to a Charitable Organization* form.
- Any tax questions resulting from this gift transfer should be directed to your tax advisor.
- If you are holding stock certificates for shares involved in this gift transfer, return them by registered or certified mail along with this form. Without them, we will not be able to transfer the shares. **DO NOT** sign the certificates.

If you are gifting shares to an individual or entity (other than a charitable organization) and the recipient does not already have an American Funds account, the recipient of the gift will first need to obtain and complete an account application, available from your financial professional. Page 2 of this form must be signed by the recipient. All pages of this form must be submitted at the same time, along with the account application.

## 1 Donor account information

Enter the information exactly as it appears on your American Funds account statement. Please type or print clearly.

Account number \_\_\_\_\_

\_\_\_\_\_  
Name of owner (trustee, etc.)                      Name of co-owner (co-trustee, etc., if applicable)

\_\_\_\_\_  
Address    City    State                      ZIP

(      )  
Daytime phone

Email address\* \_\_\_\_\_

Check here if the mailing address entered above is new. Our records will be updated accordingly.

\* Your privacy is important to us. For information on our privacy policies, visit [www.capitalgroup.com](http://www.capitalgroup.com).

## 2 Donor gift instructions

For fund names and numbers, review your statement or access your account at [www.capitalgroup.com](http://www.capitalgroup.com).

Provide information below regarding the existing shares you wish to transfer. (If Specific Lot Identification is your cost basis method and you are requesting a partial transfer, you must provide the exact number of shares and corresponding purchase date(s) on a separate page.)

Fund name or number	Amount	Number of shares	Percentage
_____	\$ _____	<b>OR</b> _____	<b>OR</b> _____ %
_____	\$ _____	<b>OR</b> _____	<b>OR</b> _____ %
_____	\$ _____	<b>OR</b> _____	<b>OR</b> _____ %
_____	\$ _____	<b>OR</b> _____	<b>OR</b> _____ %
_____	\$ _____	<b>OR</b> _____	<b>OR</b> _____ %
<b>Total \$</b>		<b>OR</b>	
_____		_____	

The effective date of the gift will be the date this request is processed unless an alternate date is provided below.

Alternate effective date of the gift (not the trade date) (optional — may not be a future date) \_\_\_\_\_  
(mm/dd/yyyy)

**Note:** The cost basis method currently on file for this account will be used. To change the cost basis method, obtain and complete a *Cost Basis Update Request*, or access your account at [www.capitalgroup.com](http://www.capitalgroup.com) prior to submitting this request.



### 3 Recipient account information

Name of recipient \_\_\_\_\_

Email address\* \_\_\_\_\_ ( )  
Daytime phone \_\_\_\_\_

To transfer shares to an existing American Funds account, provide that account number here \_\_\_\_\_

**Note:** If no American Funds account exists, the recipient must submit a completed account application with this form.

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### 4 Cost basis — recipient signature

If the cost basis method on my new or existing account is Average Cost, I agree to accept the fair market value as the cost basis of the shares in the event the donor's shares are gifted at a loss.

**X** \_\_\_\_\_ / /  
Signature of recipient Date (mm/dd/yyyy)

**This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.**

**Important:** If you do not sign above, and your cost basis method is Average Cost, and shares are gifted at a loss, the cost basis method will be changed to First In, First Out. Any tax questions should be directed to a tax advisor.

- Notes:**
- The cost basis default for a new account is Average Cost.
  - To change the cost basis method, obtain and complete a *Cost Basis Update Request*. Existing shareholders may update their cost basis method at [www.capitalgroup.com](http://www.capitalgroup.com) prior to submitting this request.



## 5 Donor authorization and signature guarantee — required

I authorize the gift of shares as indicated in Section 2.

**X**

Signature of owner or person authorized to act on behalf of the account

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date (mm/dd/yyyy)

**X**

Signature of co-owner (co-trustee, etc., if applicable)

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date (mm/dd/yyyy)

**This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.**

**A signature guarantee is required**, and signatures must be guaranteed by a bank, savings association, credit union or 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.

**Note:** A medallion guarantee is acceptable in place of a signature guarantee.

**GUARANTOR:**  
Stamp signature guarantee or medallion guarantee here.

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Stamp signature guarantee or medallion guarantee here.

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

If you have questions or require more information, contact your financial professional or call American Funds Service Company at (800) 421-4225.