



# JEWISH FEDERATION OF THE EAST BAY THE JEWISH COMMUNITY FOUNDATION

## **STOCK TRANSFER INSTRUCTION LETTER**

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Broker Name)

\_\_\_\_\_  
(Broker Street Address)

\_\_\_\_\_  
(Broker City, State, Zip)

\_\_\_\_\_  
(Broker Phone Number)

Dear \_\_\_\_\_ :

I/We wish to make a charitable gift to the Jewish Community Federation of the Greater East Bay. To that end, please transfer the following securities from account # \_\_\_\_\_, in the name of \_\_\_\_\_ :

<u>No. of shares</u>	<u>Security name</u>	<u>Ticker symbol</u> <u>(if known)</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please do not send stock certificates to the Jewish Community Federation of the Greater East Bay. Stock should be transferred directly to the Jewish Community Federation of the Greater East Bay account as follows:

Broker: Charles Schwab  
 Account Name: Jewish Community Federation of the Greater East Bay  
 Account Number: 4752-0118  
 DTC #: 0164 Code 40  
 Tax ID: 94-1156560  
 For the benefit of: \_\_\_\_\_

\_\_\_\_\_  
(apply the gift to which fund or program?)

A confirmation letter showing the date of transfer and value of stocks on transfer date would be appreciated.

Thank you for your assistance.

Sincerely,

\_\_\_\_\_  
(Account Holder 1)

\_\_\_\_\_  
(Account Holder 2; two names are required  
for joint accounts.)

To enable us to determine who has donated this gift of securities, and to enable prompt processing, please notify us by sending us a copy of this form to us immediately after sending to your broker.

**PLEASE EMAIL, FAX OR MAIL TO:**  
**Jewish Federation of the East Bay, ATTN: Denise Harter**  
 PO Box 370, Berkeley, CA 94701-0370 Tel: (510) 809-4916 Fax: (510) 318-8344 Email: cfo@jfed.org