

DONOR-ADVISED FUND CONTRIBUTION TRANSMITTAL FORM



STOCK GIFTS

How to prepare: Before initiating a transfer of securities to the Federation, please complete and send this form to your broker and also to the Federation at DAF@sfjcf.org, or via fax: Attn: DAF Team at 415.322.7009. You or your financial representative must provide correct information prior to the transfer to avoid crediting delays and possible fluctuations in the trading price of the stock.

Donor/Contributor(s): _____

For credit to Donor Advised Fund Name: _____ Fund Number: _____

Transfer Instructions for Gifts of Stock *Securities transferred electronically to Charles Schwab**

Financial Institution: Charles Schwab
DTC #: 0164
Account Name: Jewish Community Federation
Account Number: 4752-3753

** If you are donating restricted stock, contact our Manager of Investments at 415.512.6238.*

Name of security:	Number of shares
_____	_____
_____	_____
_____	_____

Name of donor's broker: _____

Name of donor's broker firm: _____

Donor's brokerage account number: _____

Date transaction was initiated: _____

VERY IMPORTANT: Please complete and submit this form to your broker and also email a copy to the Federation at DAF@sfjcf.org, or fax it to us at 415.322.7009, attention DAF Team. Thank you.

☐ If your contribution is \$25,000 or greater, it will be added to your selected Pool. If the contribution is less than \$25,000 it will remain in the Money Market, unless you indicate here that you would like it added to your investment pool. (check box here)

Signature _____ Date _____

Please call/email me at _____ to confirm receipt of this document.

For your information, the Federation's tax ID number is: 94-1156533

JEWISH COMMUNITY FEDERATION AND ENDOWMENT FUND
DONOR-ADVISED FUNDS, 121 STEUART ST., SAN FRANCISCO, CA 94105
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