

# STOCK TRANSFER INSTRUCTIONS



## To transfer stock to the Jewish Community Federation:

1. Fill out attached Transfer Authorization form.
2. Call April Elam at 415.369.2876 if you need our account number at your brokerage house (other than Charles Schwab).
3. Send the original copy of the attached Gift of Securities Transfer Authorization form to your broker.
4. **Very important:** Fax, email, or mail a copy of the attached Transfer Authorization to: April Elam

Email: AprilE@sfjcf.org

Fax: 415.543.4134

Mail to: Jewish Community Federation and Endowment Fund  
121 Steuart Street  
San Francisco, CA 94105

### **The Mechanics of Stock Donations**

#### **Your Charitable Tax Deduction:**

*For tax purposes, your deduction will equal the average of the high & low on the date of the gift. The gift date is the day the securities were transferred to the Federation.*

#### **Amount Credited to your Pledge:**

*It is the Federation's policy that your account is credited by the amount the Federation receives from the sale of the stock, net of any fees.*

# GIFT OF SECURITIES TRANSFER AUTHORIZATION



If you need a broker to facilitate the transfer or additional information concerning your gift of securities to the Federation, please call April Elam at 415.369.2876. If you wish to use your own broker for the transfer, please fill in the following:

To: \_\_\_\_\_  
Broker Name

I wish to make a gift of securities from my account. Please accept this as authorization to transfer the securities listed below.

FROM: \_\_\_\_\_  
Account Name Your Name (if different)

Account Number: \_\_\_\_\_

\_\_\_\_\_ Shares \_\_\_\_\_ Security Description

TO: Jewish Community Federation Account Number: **Schwab, Acct. # 4752-3753; DTC # 0164**

*The Federation has accounts at most of the major brokerage houses in the Bay Area. You can ask your broker to look up our account or call April Elam, at 415.369.2876, for account information.*

Please indicate how we should apply your contribution:

- Contribution for the Annual Campaign
- Contribution for a Philanthropic Fund (Donor Advised Fund/DAF): \_\_\_\_\_  
Fund Name or Number
- Contribution for a Restricted or Endowed Fund: \_\_\_\_\_  
Fund Name or Number

Your Signature \_\_\_\_\_ Date \_\_\_\_\_

Additional Signature (if Joint Account) \_\_\_\_\_ Date \_\_\_\_\_

Send original to your broker and a copy to April Elam, at:

Jewish Community Federation and Endowment Fund  
121 Steuart Street, San Francisco, CA, 94105

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AprilE@sfjcf.org