

STOCK TRANSFER INSTRUCTIONS



To transfer stock to the Jewish Community Federation:

1. Fill out attached Transfer Authorization form.
2. Call Peggy Maskey at 415.512.6238 if you need our account number at your brokerage house.
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: Peggy Maskey

Email: PeggyM@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 Peggy Maskey at 415.512.6238. 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 Peggy Maskey, at 415.512.6238, 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 Peggy Maskey, at:

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

Fax 415.543.4134 Tel 415.512.6238
PeggyM@sfjcf.org