

**BAY AREA**

**STOCK GIFTS**

**Please complete the following two steps:**

1. Fill out and forward this form to your financial professional to initiate the transfer of stock into your Federation donor-advised fund (DAF).
2. Send the form to: [daf@jewishfed.org](mailto:daf@jewishfed.org) or fax it to 415.322.7009 attention: DAF Team

Donor/Contributor(s): \_\_\_\_\_

For credit to DAF Name (if known): \_\_\_\_\_ Fund Number (if known): \_\_\_\_\_

**Please transfer securities\* electronically to the Federation's Charles Schwab account:**

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

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: \_\_\_\_\_

**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 Short-Term Pool (Money Market), unless you indicate here that you would like it added to your investment pool (check box.)**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Federation Tax ID#: 94-1156533**

*\*If you are donating restricted stock, please contact our Manager of Investments at 415.369.2876.*

**Jewish Federation Bay Area  
121 Steuart Street  
San Francisco, CA 94105**