

# JEWISH FEDERATION

## ANNUAL CAMPAIGN/SPECIFIC FUND STOCK/PUBLICLY TRADED SECURITIES TRANSFER INSTRUCTIONS

### STEP 1: REQUEST THE TRANSFER

Contact your financial advisor or institution to initiate the stock transfer. Please note that the transfer may take 5 to 7 business days to send from your financial institution to Northern Trust. Your institution will ask you to provide the following information:

Brokerage Firm: Northern Trust  
Account Name: JCF - Stock Gift Account  
Account Number: 44-37299  
DTC Number: 2669  
Reference: Donor Name or Fund Number

### STEP 2: NOTIFY JEWISH FEDERATION BAY AREA

To ensure that your contribution is applied to the Annual Campaign or a specific fund, notify your Philanthropy Advisor or [philanthropy@jewishfed.org](mailto:philanthropy@jewishfed.org) of the transfer including the following information:

Stock Name/Stock Ticker  
Number of Shares  
Date Transfer Initiated  
Annual Campaign or Specific Fund

### PROCESSING TIME

Upon receipt of stock, the Federation will sell the shares and the proceeds will be deposited into the appropriate fund within 4 to 6 business days.

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

**FEDERATION TAX ID: 94-1156533**