

JEWISH FEDERATION

DONOR-ADVISED FUNDS

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 your donor-advised fund, notify your Philanthropy Advisor or DAF@jewishfed.org of the transfer including the following information:

Stock Name/Stock Ticker
Number of Shares
Date Transfer Initiated
Your Donor-advised Fund Name and Fund ID

PROCESSING TIME

Upon receipt of stock, the Federation will sell the shares and the proceeds will be deposited into your donor-advised 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