

# STOCK TRANSFER INSTRUCTIONS



## To transfer stock to the Jewish Community Federation:

1. Fill out attached Transfer Authorization form.
2. Send the original copy of the attached Gift of Securities Transfer Authorization form to your broker.
3. **Very important:** Email or mail a copy of the attached Transfer Authorization to

Robert Deshaine

Email: robert@jewishannarbor.org

Mail to: Jewish Federation of Greater Ann Arbor

2939 Birch Hollow Drive

Ann Arbor, MI 48108

### **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



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 Federation of Greater Ann Arbor Account Number: **Schwab, Acct. # 1160-4301; DTC # 0164**  
**Code40**

Please indicate how we should apply your contribution:

- Contribution for the Annual Community 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 Robert Deschaine  
at: JEWISH FEDERATION OF GREATER ANN ARBOR**

**2939 Birch Hollow Dr. Ann Arbor, MI 48108  
PH: (734) 773-3536**

**robert@jewishannarbor.org**