

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

Osnat Gafni-Pappas

Email: osnat@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 Osnat Gafni-Pappas at:

JEWISH FEDERATION OF GREATER ANN ARBOR

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