

# JCC East Bay

Jewish Community Center of the East Bay

## STOCK TRANSFER INSTRUCTION LETTER

Date \_\_\_\_\_

Broker Name \_\_\_\_\_ Broker Phone Number \_\_\_\_\_

Broker Street Address \_\_\_\_\_

Broker City \_\_\_\_\_ Broker State \_\_\_\_\_ Broker Zip \_\_\_\_\_

Broker Phone Number \_\_\_\_\_

I/We wish to make a charitable gift to the Jewish Community Center of the East Bay. To that end, please transfer the following securities from account number \_\_\_\_\_, in the name of \_\_\_\_\_.

Number of Shares	Security Name	Ticker Symbol <i>(Recommended)</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please do not send stock certificates to the Jewish Community Center of the East Bay. Stock should be transferred directly to the Jewish Community Center of the East Bay account as follows:

Broker: Charles Schwab  
Account Name: Jewish Community Center of the East Bay  
Account Number: 8126-3266  
DTC Number: 0164 Code 40  
Tax ID: 71-0995500  
For the benefit of: \_\_\_\_\_  
*(Which fund or program should this gift be applied to?)*

A confirmation letter showing the date of transfer and value of stocks on transfer date would be appreciated.

Sincerely,

\_\_\_\_\_  
Account Holder 1

\_\_\_\_\_  
Account Holder 2 *(two names are required for joint accounts)*

To enable us to determine and acknowledge your gift of securities, and to facilitate prompt processing, please notify us by sending a copy of this form to us immediately after sending to your broker. Please email, fax, mail this form to:

JCC East Bay, ATTN: Julie Iny, Senior Development Director  
1414 Walnut Street, Berkeley, CA 94709  
Tel: (510) 848-0237 | Fax: (510) 848-0170 | Email: juliei@jcc eastbay.org