



# Securities Transfer Instructions\*

Updated 6/14/17

## Step 1

Send this form to your broker to authorize a transfer of **long-term appreciated securities** to the Jewish Communal Fund. (Some brokers require an original signature or signature guarantee. Please consult your broker for instructions.)

## Step 2

Email or fax this form to the Jewish Communal Fund prior to transferring the assets to **alert us** that you have authorized the transfer. As soon as we receive your gift, the securities will be sold.

## Step 3

Fill out the **Contribution/ Fund Investment Recommendation Form** to update your fund's investment allocation.

TO:

\_\_\_\_\_  
Broker name

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Telephone

FROM:

\_\_\_\_\_  
Your name

\_\_\_\_\_  
Telephone

I hereby authorize the transfer of the following securities from my brokerage account # \_\_\_\_\_

TO: **Account: Jewish Communal Fund**  
**Via DTC #0443 (Pershing LLC)**  
**Account #T2Q 007366**

\_\_\_\_\_  
Security description

\_\_\_\_\_  
Number of shares or units

\_\_\_\_\_  
Security description

\_\_\_\_\_  
Number of shares or units

\_\_\_\_\_  
Security description

\_\_\_\_\_  
Number of shares or units

\_\_\_\_\_  
Security description

\_\_\_\_\_  
Number of shares or units

**\*Stocks may be transferred via DTC. To transfer mutual funds or bonds, please call Saul Wadowski at (646) 843-6882 or email [saul@jcfny.org](mailto:saul@jcfny.org) for instructions.**

\_\_\_\_\_  
Account owner's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Account co-owner's signature (if joint account)

\_\_\_\_\_  
Date

Thank you for choosing the Jewish Communal Fund to assist you with your charitable giving.