



Transfer of Securities to:  
The Jewish Community Foundation of the West

2130 21<sup>st</sup> Street, Sacramento, CA 95818

Phone: 916-441-1613 Email:

[pam.herman@jcfwest.org](mailto:pam.herman@jcfwest.org)

Instructions to Donors:

1. **Notify the Foundation of an Incoming Transfer.**

Please email this form to [pam.herman@jcfwest.org](mailto:pam.herman@jcfwest.org) (Note: Failure to complete this step may result in a delay in crediting your contribution to the correct account.)

2. Fill out this form and provide a copy to your broker.

Date: \_\_\_\_\_

From: \_\_\_\_\_

Donor(s) Name

Donor's Brokerage Account Number

Street Address

City, State Zip Code

Fax, Mail or Present this Form To:

Your Broker Company Name

Street Address

City, State Zip Code

Please transfer \_\_\_\_\_ from my/our

Identify the number of shares and name of the Security (eg. 100 shares of XYZ Company)

account identified above to the Jewish Community Foundation of the West (Tax ID. No. 68-0445835). The transfer should be made to:

DTC Clearing Number: 0015  
FBO Jewish Community Foundation of the West  
A/C: 178-027800-060  
Morgan Stanley Smith Barney  
400 Capitol Mall, Ste. 1900  
Sacramento, CA 95814

Account Holder - Print Name

Account Holder -Print Name

Account Holder—Signature

Date

Account Holder—Signature

Date