



Transfer of Securities to:

The Jewish Community Foundation of the West

2130 21st Street, Sacramento, CA 95818

Phone: 916-441-1613 Email:

pam.herman@jcfwest.org

Instructions to Donors:

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

Please email this form to 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

Proceeds from the sale of these assets go into the above fund*

*Please note: The Jewish Community Foundation of the West reserves the right to charge a fee to process any contributions that are not to a fund held at the Foundation. The fee for these "pass-through" transactions will be assessed at 2%, with a minimum of \$180.00

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: 178-033204-095
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