



### Stock Transfer Donations

Thank you for your desire to support the work of Jewish Family Service through a stock transfer. Jewish Family Service works with the Jewish Federation of Metropolitan Detroit, and the United Jewish Foundation (the custodian of the Jewish community’s financial and real estate assets), and its broker to complete stock transactions. Donors can transfer securities to the Federation’s brokerage account. Federation will then sell the shares and once the proceeds are received, usually within one week, funds will be transferred to Jewish Family Service.

Attached are the transfer details needed for a broker to proceed. Usually a broker will ask a donor to sign a form authorizing to transfer the shares; attached is a sample of such an authorization letter.

Once a transfer is requested it is helpful to let JFS have a copy of the information including the name of securities, the number of shares and expected time of transfer. JFS will then inform Federation and stay in touch to make sure the donation is received and applied as intended and then transferred to JFS.

Since Federation will be the initial recipient of the gift, it will be issuing the tax letter.

#### Contact at Federation

Alysha Kelly  
(248) 833-2510, [kelly@jfmd.org](mailto:kelly@jfmd.org)

#### Contact at Jewish Family Service

Amy Newman  
(248) 592-2327, [anewman@jfsdetroit.org](mailto:anewman@jfsdetroit.org)

#### Federation Brokerage Firm

Muriel Siebert & Co., Inc  
885 Third Avenue, Ste. 1720  
New York, NY 10022

Transfer Information for the Jewish Federation/United Jewish Foundation Account.

- ✓ DTC#: 0226
- ✓ Account Number: CXT-528884
- ✓ Account Name: Jewish Federation of Metropolitan Detroit
- ✓ Federal Tax ID: 38-1359214
- ✓ Trading Desk: 800-872-7865

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#### Sample Letter

Date: \_\_\_\_\_  
Re: Account #: \_\_\_\_\_  
Account Name: \_\_\_\_\_

Please consider this letter your authorization to transfer via DTC (free delivery) the following:

Number of shares: \_\_\_\_\_  
Security Name: \_\_\_\_\_

DTC# 0226  
For deposit to account: CXT-528884  
N/O Jewish Federation of Metropolitan Detroit  
Your prompt attention to this matter is appreciated.  
Sincerely,