

INSTRUCTIONS TO DONATE STOCK
Updated 10-06

To make your gift through a donation of appreciated stock, please give your stock broker the following information:

Brokerage Office: Charles Schwab & Co., Inc.
Attn: Transfer of Accounts
P.O. Box 52013
Phoenix, AZ 85072

- **Account name:** Congregation Beth Am
- **Charles Schwab Account No:** 2466-5049
- **DTC Clearing:** 0164, Code 40
- **Notification:** Please call Rachel Tasch in the synagogue office to let us know what stock you are transferring, the date of your transfer, and your broker's name and telephone number so that your donation can be properly identified when it is received by Charles Schwab. You may e-mail: rtasch@betham.org. We need you to do this at the same time you authorize your broker to make the transfer.
- **Donation receipt:** Please notify us in advance of making the transfer, so that we can watch for your stock to appear in our brokerage account, and know it is coming from you. Our ability to provide you with a timely receipt for your tax records is dependent on your notification to us of your intent to transfer stock. Your stock gift will be valued at the average of the high and low price of the stock on the date the stock is received by our broker.