



Development Office
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STOCK TRANSFER INSTRUCTION SHEET

IMPORTANT

1 Please complete this form and forward it to your financial advisor or broker.

2 Please also forward a copy of this form to the Development office via email at development@jccotp.org. This form of communication is important in the gift receipting process, as donor information is not always included in the DTC wiring system.

If you have any questions, please contact the Development office at (201) 569-7900, ext. 607 or via email at development@jccotp.org.

TO (DONOR'S FINANCIAL ADVISOR)

TELEPHONE

FAX

Please use this form as authorization to transfer the securities listed below from my account to the account of The JCC on the Palisades account at Merrill Lynch.

FROM (DONOR NAME)

ADDRESS

TELEPHONE

FAX

NAME OF SECURITIES

NUMBER OF SHARES

GIFT PURPOSE

SIGNATURE

DTC Transfer Instructions for Broker and Financial Advisors

For gifts of securities to Kaplen JCC on the Palisades, please deliver by DTC to:
Merrill Lynch
DTC # 8862, for Jewish Community Center on the Palisades
Brokerage Account #: 725-02564
Attention: The Lippman Group (Ariel Jacobs)
Tel. (201) 592-3831 or (800) 723-3098
Email: DG.LippmanGroup@ml.com

IMPORTANT

For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift