



Stock Transfer Instructions

Thank you for considering a donation of stock or mutual fund.

Please notify us immediately that you are making a stock transfer or mutual fund donation. Contact Kaia Burkett, Executive Director, at either kburkett@kolshofar.org or (415) 388-1818, ext. 103.

The synagogue relies on your notification regarding the actual stock transfer. We do not receive the name of the person who has made the transfer and we need to be able match your information with the amount/stock in our account.

Please include the following information

- Date of transfer
- Name of the stock
- Number of shares
- Allocation of funds (i.e. membership, capital campaign)

Please advise your broker to use the DTC system: Note the number of shares of “xyz” stock to Raymond James number 0725 for credit to one or both of these accounts:

- **Membership and other General Donations:** Acct #: 580LX906

CONGREGATION KOL SHOFAR, A NON PROFIT CORPORATION CONGREGATION KOL SHOFAR

- **Capital Campaign/Building Fund:** Acct #: 845P5817

Questions: Contact Natasha Turner, Sales Assistant to Mark J. Rubin

(415) 870-2491 direct or (844) 262-4816 fax
natasha.turner@raymondjames.com

Thank you for your gift. For any additional questions please contact Kaia Burkett, Executive Director, at kburkett@kolshofar.org or (415) 388-1818, ext. 103.