*Your name here*

*Address*

*Date*

*Name of your financial place*

*Address of your financial place*

Fax of your financial place: *XXX/YYY-ZZZZ*

*Email of your financial place*

Re: Gift to: JEWISH RECONSTRUCTIONIST CONGREGATION

Dear *Financial place or person*,

By these instructions we make a gift of the below described shares of stock to the referenced religious/charitable organization.

From the account of {*your name here*} *(#account number here*) please wire transfer via Oppenheimer & Co. (DTC #0571) into the account of the Jewish Reconstructionist Congregation (#G40-1124396), Evanston, IL, {*# of shares*} shares of {*what is being transferred*}. These shares are transferred (effective upon your receipt of these instructions) as a donation to the JEWISH RECONSTRUCTIONIST CONGREGATION from {*your name(s) here*} in satisfaction of {*What commitments is this covering? All? Something specific?*} commitments for the calendar year {*calendar year*}.

Please inform us of the fair market value of the subject shares on the date of receipt of this letter by completing the bottom of this page, signing, and returning the enclosed copy. We are sending a copy of this letter directly to the donee of this gift for purpose of notification.

Sincerely,

*Your name here*

CC: JRC Office c/o Sharon Diaz

Fax: 847/328-2298 or

Email: sdiaz@jrc-evanston.org

Received the within instructions for execution this \_\_\_\_ day of \_\_\_\_\_\_\_\_, 20XX. The Stock Exchange prices for the subject shares of stock on this date are:

# **Description of shares** **Price per share**

Open Close

# shares-*name* Company

# shares- *name* Company

*Financial Place*

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Financial person or contact*

**Instructions**

**The attached letter is a generic stock/securities transfer document.  Use it as your official document to transfer stocks or securities to JRC for payments of your commitments to the congregation. Please follow these simple instructions to fill out this document.**

1. **Fill out all the areas in red. Please list the securities you want** transferred **and how many.  If you are transferring more than one security, list each in the same manner.**
2. **Fax or email a copy of this letter to your financial person. Make sure you ask your financial person which way they prefer to be notified. Some only accept fax and some will accept both. Make sure you also mail (yes, snail mail) a hard copy to him/her.**
3. **Fax or Email a copy to the JRC office, c/o Sharon Diaz. This will let the office know what you are doing and to whom the transfer should be applied. It also lets them know what commitments are being covered by the transfer. The JRC office will immediately alert the Oppenheimer Group to be aware a transfer will be coming through.**
4. **Your financial person should send you back the letter with the bottom part filled out.**

**How it works:**

**When the security is transferred into the** JRC **account the Oppenheimer Group liquidates it to cash.  The cash then goes to JRC and is applied to your account for your commitments.**

**\*\*\*\*\*\*\*\*\*\*\*\*IMPORTANT\*\*\*\*\*\* IMPORTANT\*\*\*\*\*\* IMPORTANT\*\*\*\*\*\*\*\***

**If you do not let the JRC office know you will be initiating a security transfer, the liquidation might not happen quickly and the price of the security might change in the gap. By informing the office, by fax or email, with a copy of your document, you can be assured that the transfer will happen and everything will be applied to you and your family.**

**This transfer can be used for a specific thing you might be giving to JRC or ALL of your obligations for the year.**

**Rev.2.4.2019**