

## **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 email Beth Am Accounting Manager Karen Wilkinson (KWilkinson@betham.org) 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.*

**Donation receipt:** 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. A receipt will be mailed to you and your gift will also appear on your year-end statement in January.