



COLUMBUS JEWISH FOUNDATION

This form to be used if Columbus Jewish Foundation **does not have** an account at your stock broker's office

Date _____

Name of Broker _____

Brokerage House _____

Address _____

HOW TO TRANSFER STOCK TO THE COLUMBUS JEWISH FOUNDATION

The procedure for transferring gifts of stock from your brokerage account to the Columbus Jewish Foundation is simple. Just complete this letter and send to your broker. Upon receipt, your broker should immediately call the Foundation's CFO, Tamra Fitzpatrick, at 338-2365 for further instructions.... do not personally authorize your broker to sell the stock or you will be subject to capital gains. Upon notification, Ms. Fitzpatrick will handle all sales so that your gift will be properly credited and acknowledged.

Dear Broker:

I would like to make a charitable donation to the Columbus Jewish Foundation, to be earmarked for my named fund: _____.

This is to authorize you to wire the below shares from my account (# _____) to Charles Schwab DTC #0164 for the account of the Columbus Jewish Foundation account #2444-9856. Please call the Foundation's Chief Financial Officer, Tamra Fitzpatrick, at (614) 338-2365 to notify her of this gift so she can give sale instructions.

Name of stock _____ # of shares _____

Name of stock _____ # of shares _____

Name of stock _____ # of shares _____

Signed _____

Your signature

Giving long-term appreciated stock offers you a two-fold saving. First, you avoid paying any capital gains tax on the increase in value of your stock. In addition, you receive a tax deduction for the full fair market value of the stock on the date of the gift. For income tax purposes, the value of such gifts may be deducted up to 30% of adjusted gross income, with an additional five-year forward.