

**RE: Instructions for the Transfer of Gifts of Appreciated Stock**

1. Your transfer will be done through our broker at:

**SEI Private Trust Company  
1 Freedom Valley Drive  
Oaks, PA 19456**

Your broker should wire transfer the gift directly into the account of  
Congregation Rodeph Sholom:

**DTC Participant Number 2039  
Credit Account Number - 11102-C  
FFC Account Number - 15922-STK  
FFC Account of - CONGREGATION RODEPH SHOLOM-STK**

**Mutual Funds Transfer  
Please contact Brian Friedrich at  
bfriedrich@crsnyc.org for more details**

2. Immediately upon transfer of stocks, please notify Brian Friedrich at  
bfriedrich@crsnyc.org or (646)454-3042.

We need the following information in order to properly credit your records:

Name of the security \_\_\_\_\_  
Number of shares \_\_\_\_\_  
Approximate date of delivery \_\_\_\_/\_\_\_\_/\_\_\_\_  
Name of delivering broker \_\_\_\_\_  
Name of donor \_\_\_\_\_  
Contact phone and email \_\_\_\_\_  
\_\_\_\_\_

Purpose of transfer: (i.e. Annual Appeal, Food Drive, Religious School  
Scholarship, Clergy Discretionary fund etc.)

**Note: Transfer minimum is a gift of \$2500**

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If you have questions related to the Stock Transfer, please contact Brian  
Friedrich at 646-454-3042 or at bfriedrich@crsnyc.org