



Transfer Instructions for Making a Gift of Securities to the Bernard Zell Anshe Emet Day School

Gifts of appreciated securities are a smart and simple way to maximize the effectiveness of your charitable giving. If stocks you have held for more than a year have increased in value, you may want to consider using these assets – rather than cash – to fund your giving. By transferring ownership of your long-term stock to BZAEDS, you make a gift to support the school, avoid the capital gains tax you would pay if the stock were sold, and you may claim a charitable tax deduction for the current fair market value of the asset.

Stock Transfers:

- **DTC Transfer** – If you have your shares of stock in a brokerage account this is a convenient way to transfer securities. Simply instruct your broker to electronically transfer your securities out of your account into BZAEDS' [TD Ameritrade or Merrill Lynch] account and provide the appropriate account information below:

Merrill Lynch
FBO: BZAEDS
DTC #: 0226
Account Number: PUH070505

- **Certificate Transfer** – Transferring your certificate can be as easy as endorsing the back of the certificate and sending it by certified mail to the school. You must sign the certificate in front of a bank officer to obtain a Medallion Signature Guarantee (notary public stamps are not an acceptable guarantor for stock certificates). Endorse the certificate exactly as your name appears or names appear on the front. For example, if your certificate is listed as “Jeffrey F. and Margo P. Smith,” you will need to sign the certificate exactly as “Jeffrey F. Smith” and “Margo P. Smith.”

Then, write **BZAEDS' tax identification number, 36-2166955**, in the box on the back requesting a social security number or other identifying number of assignee. Mail the certificate by certified mail to:

Bernard Zell Anshe Emet Day School
ATTN: Development Office
3751 N. Broadway Street
Chicago, IL 60613

Disclaimer: The information contained in this article is not intended as a substitute for wise tax counsel. We strongly recommend you consult with a professional tax advisor before making a gift of securities.



Appreciated Securities Transfer Form

When making a gift of appreciated securities to BZAEDS it is important that you contact the Development Office in advance so that your gift will be properly credited when received and so that we may provide you with an acknowledgement letter for your tax purposes.

This form is to assist you in contacting BZAEDS with the details of your transfer. When completed, you may either mail it to us at: Bernard Zell Anshe Emet Day School, ATTN: Development Office, 3751 N. Broadway Street, Chicago, IL 60613; fax it to (773) 529-3709; or send this information as an e-mail to mgoldwin@bzaeds.org. If you have any questions or need further information, please call our development team at (773) 572-1238.

Date: _____

Donor
Name(s): _____

Mailing Address:

City/State/Zip:

Daytime Phone: _____ E-mail: _____

Quantity/Name/Symbol of Securities being transferred:

Number of Shares: _____ Security: _____

Designation: Annual Campaign _____ Endowment Fund _____ Other _____

Stock brokerage firm:

Broker's Name: _____ Phone Number: _____

Stock will be transferred to BZAEDS' account at:

Merrill Lynch: _____