

The Rashi School

Stock Gift Transfer Instructions

The Rashi School accepts charitable contributions in the form of securities. Stocks and bonds are, next to cash, the most popular way of making a gift. Gifts of securities can be one of the most advantageous ways of giving. If you've owned a stock for more than a year, you may qualify to deduct the full market value of the stock as a charitable contribution and receive very favorable tax treatment. Donors should be advised to consult with their tax advisor regarding their own specific situation.

Donations of this nature may be given as an outright gift or to fulfill a pledge.

To make your gift of securities, please follow the steps below:

For securities held at a brokerage house or other financial institution:

1) Contact The Rashi School's investment management firm:

Morgan Stanley
53 State Street, 39th Floor
Boston, MA 02109
617-589-3286

2) Advise that you would like to make a transfer of stock to The Rashi School's account.

3) Provide the following Rashi School Financial Account Information:

- Rashi Account #: 625-711778-495
- Name of Account: The Rashi School Inc.
- DTC #: 0015

4) Advise the broker of the following information:

- Name and phone number of the donor's broker;
- DTC # of the institution from which the securities will transfer;
- Name of stock and the number of shares to be donated;
- Who is in possession of the stock certificates (you or your brokerage firm);
- Whether the stock is preferred or has any restrictions;
- Purpose or designation of the gift.

For securities held by the donor (stock has no restrictions and is not preferred):

- 1) Send stock certificate by certified mail or courier to The Rashi School's investment management firm. (certificates should be sent *without any endorsement or assignment*.)
- 2) Include a letter that references the purpose/designation of the gift.
- 3) Include *one* endorsed Stock Power Form *per certificate* to Rashi's broker in a separate envelope.
 - The owner of the stock should endorse each form exactly as the name(s) appear on the front of each certificate.

We kindly ask that the donor or their broker contact the Rashi Development Office to advise of the pending gift as the name is not always attached to the stock.

Please note: it is the standing policy of The Rashi School to sell gifts of stock at the earliest available opportunity.

For additional information or for assistance, please contact:

- Amy Klotz, Associate Director of Development at 781-355-7309 or aklotz@rashi.org

Thank you for considering a gift of securities to The Rashi School.