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Denver Jewish Day School
INSTRUCTIONS FOR STOCK GIFTS
March 2017

The following are the necessary instructions that will make it possible for you to gift stock to Denver Jewish Day School.

If the security or securities to be gifted are held in “street name”, meaning that the positions are held in the donor’s brokerage account, the following must occur:

- a. The donor must instruct his or her broker of the transfer request. This request does require a letter signed by the donor. (Usually the brokerage firm will have a standard form on file for this request.)
- b. In addition, the following information needs to be included in your letter request in order for the gifting to occur:
 - Denver Jewish Day School account number at TD Ameritrade – 911-609040
 - the TD Ameritrade’s DTC number - 0188
 - the phone number for TD Ameritrade is (888) 354-8361
 - the address for Ameritrade is:
 - TD Ameritrade Institutional
 - 4075 Sorrento Valley Blvd. Suite A
 - San Diego, CA 92121-1404

If the donor has the actual certificate, they need to:

1. write a letter of authorization, stating that they wish to donate certificate # _____ for _____ # of shares of _____ (e.g. IBM) stock, to the TD Ameritrade account of Denver Jewish Day School, Account #911-609040. (If the donation is over the amount of \$50,000, please have the letter notarized to avoid problems with the transfer agent);
2. The letter and certificate is to be sent to TD Ameritrade at the above address;

3. In a separate envelope, send a copy of the letter and a stock power, signed exactly as it is on the stock certificate, to match the certificate (it is important that the stock certificate and stock power not be in the same envelope since together they are negotiable);
4. If a corporation is donating the stock, they need to include their corporate resolution with the stock certificate.

Please notify Krista Boscoe, Director of Development at 720-449-9552, kboscoe@denverjds.org about the name of the stock and number of shares since statements DO NOT state the name of the donor.

Should you have any questions regarding the above information, please feel free to call George Gumbiner at Marathon Investment Management, Inc. at (888) 559-0645 or 303-708-0667.

Thank you Krista J. Boscoe, 720-449-9552, kboscoe@denverjds.org.