



Stock Transfer Request to Wornick Jewish Day School

Thank you for Choosing to Support Wornick Jewish Day School with a Stock Contribution!

To help you navigate this process, we've outlined key steps and important information below. Please feel free to reach out with any questions.

Stock Donation Process:

1. Broker Transfer Request (Form Submission):

You'll need to instruct your brokerage to transfer shares to Wornick's brokerage account. To do that, you'll need to include details about the specific stock you'd like to transfer, along with Wornick's brokerage information. You can find our brokerage information at [this link](#). Your broker may have a specific form you'll need to fill out. Here are some common examples:

a. **Schwab:**

<https://client.schwab.com/secure/file/P-2014616/APP39630-10-01.pdf>

b. **Etrade:**

<https://us.etrade.com/forms-applications> (search "charitable")

c. **Fidelity:** <https://www.fidelity.com/customer-service/how-to-gift-shares?ccsource=FA>
specifically:

https://www.fidelity.com/bin-public/060_www_fidelity_com/documents/applications/Transfer-Shares-Gift-Nonretirement.pdf

2. Notify Wornick That the Transfer is Underway

After completing and submitting the form to your brokerage, please email a copy of it to Andrea Romero at aromero@wornickjds.org. If you'd rather not provide the entire form, please tell us details of the transaction request.

This will enable us to track and identify the corresponding transfer on our end, as many brokerages do not provide information identifying the donating party.



3. **Processing Time & Next Steps:**

It can take a day or two for your brokerage to transfer the stock to our account. When it does, our brokerage will notify us and immediately (automatically) market sell any stock received for its cash value at the time.

4. **Transaction Fees and Related Considerations:**

Because stock prices often fluctuate, it is possible that the value of your donated stock decreases during the time from when you make your transfer request to when our account receives and sells the assets.

Similarly, our brokerage charges us a fee based on transaction size. Those fees can range from **1% to 1.2%** of the cash value of the transaction.

We ask that you consider these factors when setting your specific donation amount.

If you are donating stock to satisfy an existing pledge, and price slippage or brokerage fees significantly impact the net amount received by Wornick, we may reach out to you to discuss options to address.

5. **A Note on Taxes**

You may be entitled to deduct charitable stock contributions on your taxes. By [**whatever date**], Wornick will send you a charitable donation letter. This letter will note the parameters of the donation (time, identity and number of shares).

Please work with a tax advisor to understand the specific deduction you may be entitled to take. For more information, see:

https://www.irs.gov/publications/p561#en_US_202312_publink1000257938



Stock Transfer Form:

Donor Name: _____

Donor's Broker: _____

Brokerage Firm: _____

Donor's Brokerage Account Number: _____

Please transfer _____ shares of _____ stock

from my account (number listed above) to the Ronald C. Wornick Jewish Day School

brokerage account at **Oppenheimer & Co., Inc.**, account number **#A04-4135588**, DTC

number **571**, for the benefit of Ronald C. Wornick Jewish Day School.

For reference, the Tax ID number of the school is **94-2993909**.

Signed: _____

Print Name: _____

Date: _____