

**INSTRUCTIONS FOR TRANSFERRING STOCK TO
CONGREGATION BETH SHALOM**

You will need to instruct your brokerage firm to transfer the stock to the CBS account held at Fidelity. The following is the account information to provide to your broker to effectuate the transfer:

Brokerage: Fidelity Investments
Name of account: Congregation Beth Shalom
Account number: Z49957119
DTC number: 0226
Address: PO Box 770001
Cincinnati, OH 45277-0003

Additional important instructions:

Please complete the following information concerning the transfer so that we can properly apply your donation to your account.

Stock to be transferred: _____

Number of shares to be transferred: _____

Approximate date stock will be transferred: _____

Indicate how we should apply your payment (i.e., dues, Yom Kippur appeal, general donation)

Name of Donor

Date

Please consult your tax advisor regarding any tax benefits relating to this donation.