**STOCK TRANSFER ADVICE FORM**

Please complete this form in full and send it via email or mail to:

Rabbi David Marcus

Director General

492 Cedar Lane, Suite 184

Teaneck, NY 07666

Phone: 914. 368.5212 • E-mail: ravmarcus@gmail.com

**Donor and Fund Information**

Donor Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Fund Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Preferred Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Stock Contribution Information**

Name/Symbol of Stock #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Number of Shares: \_\_\_\_\_\_\_

Name/Symbol of Stock #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Number of Shares: \_\_\_\_\_\_\_

Name/Symbol of Stock #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Number of Shares: \_\_\_\_\_\_\_

 Name/Symbol of Stock #4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Number of Shares: \_\_\_\_\_\_\_

**Broker Information**

Broker Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Broker Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Expected Date of Transfer: \_\_\_\_\_\_\_

**Additional Comments**

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