ASSET TRANSFER INSTRUCTIONS

Before you initiate any electronic transfer to your DAF, please notify Conrad Cheung in CJP’s securities department at 617-457-8517, or by email at conradc@cjp.org.

To Contribute Publicly Traded Securities Held By Your Broker:
Instruct your broker to transfer the securities as follows:
Account name: Combined Jewish Philanthropies
Tax I.D. number: 04-2103559
Brokerage firm: Fidelity Investments/NFS
Account number: 101-077496
DTC number: 0226

To Contribute State of Israel Bonds:
To make contributions of State of Israel Bonds, please contact José Santiago at CJP at 617-457-8858.

To Contribute Stock Certificates Held by You:
Contact Conrad Cheung in CJP’s Securities Department at 617-457-8517 to request stock power forms. We will guide you through the process of executing and delivering these forms along with your stock/bond certificates.

To Contribute Mutual Funds:
Contact Conrad Cheung in CJP’s Securities Department at 617-457-8517 for assistance. We will check with your mutual fund company regarding signature guarantee requirements and other requirements. Typically, a letter of instruction will be required. Some mutual fund transfers can take weeks to complete. Donors wishing to ensure completion of a gift prior to a specific deadline, such as calendar year end, should begin this process well in advance.

To Contribute by Check:
Mail your check, in U.S. dollars to:
   Combined Jewish Philanthropies
   P.O. Box 723
   Reading, MA 01867-0413

Please make the check payable to CJP with the fund referenced by name in the memo field or on an enclosure.

Cash by Wire:
Please contact José Santiago at CJP at 617-457-8858 for information on transferring cash to your DAF by wire.

WIRE CASH AS FOLLOWS:
Bank: Eastern Bank
Account number: 5634601
Account name: Combined Jewish Philanthropies
ABA number: 011301390
CJP DONOR ADVISED FUND PROGRAM CONTACTS

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Vice President, Risk Management and Investment Partnerships
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General information, DAF investment options including Jewish Community Endowment Pool, LLP., gifts of assets other than cash, or marketable securities.

Mike Jones
Associate, Risk Management and Investment Partnerships
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General information, changes to signatories, addresses or fund name, termination of funds.

Jean Cooney
Vice President, Finance
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General information

Conrad Cheung
Associate Director, Philanthropic Asset Services
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Gifts of stock or mutual fund shares, investment changes, general asset transfer questions.

José Santiago
Assistant Accounting Manager, Philanthropic Asset Services
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Gifts of State of Israel Bonds, bank wire, check, or credit card; all grant recommendations.

Gerline Adrien Pierre
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General fund information.

Grant recommendations by email should be sent to: DAFgrants@cjp.org