



Donor Advised Fund

Combined Jewish Philanthropies

Kraft Family Building | 126 High Street, Boston, MA 02110-2700 | T 617.457.8500 | F 617.507.7899 | cjp.org

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



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CJP DONOR ADVISED FUND PROGRAM CONTACTS

Charlie Glassenberg

Vice President, Risk Management and Investment Partnerships

617-457-8540 charlesg@cjp.org

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

617-457-8527 mikej@cjp.org

General information, changes to signatories, addresses or fund name, termination of funds.

Jean Cooney

Vice President, Finance

617-457-8513 jeanc@cjp.org

General information

Conrad Cheung

Associate Director, Philanthropic Asset Services

617-457-8517 conradc@cjp.org

Gifts of stock or mutual fund shares, investment changes, general asset transfer questions.

José Santiago

Assistant Accounting Manager, Philanthropic Asset Services

617-457-8858 Josés@cjp.org

Gifts of State of Israel Bonds, bank wire, check, or credit card; all grant recommendations.

Gerline Adrien Pierre

Staff Accountant, Philanthropic Asset Services

617-457-8864 gerlinep@cjp.org

Contact for all grant recommendations. Gifts made by bank wire, check, or credit card.

Flora Bonilla

Staff Accountant, Philanthropic Asset Services

617.457.8539 florab@cjp.org

General fund information.

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