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
- **Broker Name:** Cynthia Jones
- **Broker Phone Number:** 800-544-5704, ext. 99

**To Contribute State of Israel Bonds**
To make contributions of State of Israel Bonds, please contact Racheline Allen at CJP at 617-457-8861.

**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:
- **Attn:** Donor Advised Fund Program
- **Combined Jewish Philanthropies**
- **Kraft Family Building**
- **126 High Street**
- **Boston, MA 02110-2700**

**Cash by Wire:**
Please contact Racheline Allen at CJP at 617-457-8861 for information on transferring cash to your DAF by wire.
CJP DONOR ADVISED FUND PROGRAM CONTACTS:

David H. Strong  
Senior Vice President & Chief Financial Officer  
617-457-8515  davids@cjp.org  
General information, DAF investment options including Jewish Community Endowment Pool, LLP.

Charlie Glassenberg  
Vice President, Gift Planning, Investment Partnerships and Corporate Compliance  
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.

Tom Healey  
Planned Giving Associate  
617-457-8527  thomash@cjp.org  
General information, changes to signatories, addresses or fund name, termination of funds.

Michal Kennedy  
Accounting Manager, Philanthropic Asset Services  
617-457-8536  michalk@cjp.org  
General information, changes to signatories, addresses or fund name, termination of funds.

Conrad Cheung  
Manager, Investment and Banking Operations  
617-457-8517  conradc@cjp.org  
Gifts of stock or mutual fund shares, investment changes, general asset transfer questions.

Racheline Allen  
Assistant Accounting Manager  
617.457.8861  rachelinea@cjp.org  
Gifts of State of Israel Bonds, bank wire, check or credit card; all grant recommendations

José Santiago  
Staff Accountant, Philanthropic Asset Services  
617-457-8858  joses@cjp.org  
Contact for all grant recommendations. Gifts made by bank wire, check or credit card.

Lisa Huang  
Staff Accountant  
617.457.8576  lisah@cjp.org  
General Fund information

Jillian Riseman  
Philanthropic Asset Services Administrator  
617.457.8826  jillianr@cjp.org  
General Fund information

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