

Donations of Stock

Thank you for your interest in making a donation of stock. Below are several brokerage accounts to choose from for transferring securities.

Please email Kimberly Driskell C.F.O. – kdriskell@jfsa.org, CFO, or call (520) 520-647-8459 to inform us of the type and amount of securities or for questions.

- RBC Capital Markets, LLC
- Broker name: RBC Wealth Management
3430 East Sunrise Dr., Suite 250
Tucson, AZ 85718

If your broker would like a contact name or number:

Bobby Present, Advisor / (520) 615-4338
Deanna Jones, Client Associate / (520) 615-4348

OR

- UBS Financial Services Inc.
- Broker name: Rottenstein Wealth Management & Consulting
2480 E. Skyline Dr., Suite 200
Tucson, AZ 85718

If your broker would like a contact name or number:

Myron Rottenstein or Aaron Rottenstein, Advisors / (520) 748-3654
Anne Shivers, Client Associate / (520) 750-7500

OR

- Schulman, Apostolik & Associates
- Broker name: Merrill Lynch
5210 E. Williams Circle, Ste 900
Tucson, AZ 85711

If your broker would like a contact name or number:

Matthew Apostolik, Advisor / (877) 874-7999