

## **Donations of Stock**

Thank you for your interest in making a donation of stock and/or bonds to the Jewish Federation of Southern Arizona. Below are several brokerage accounts to choose from for transferring securities.

Please email Kim Egita, CFO at [kegita@jfsa.org](mailto:kegita@jfsa.org) , or call (520) 577-9393 to inform us of the type [name of security] and amount of the securities [number of shares of stock/mutual fund or dollar amount of bonds] you are donating when you request the transfer. Should you have any questions please don't hesitate to contact Kim directly.

### **Merrill Lynch Wealth Management**

Broker name: Schulman, Apostolik & Associates, Wealth Management Advisors  
5210 E. Williams Circle Suite 900  
Tucson, Arizona 85711

If your broker would like a contact name or number: Matthew Apostolik, Senior Vice President-Wealth Management, Resident Director / (520) 747-6196 / [MApostolik@ml.com](mailto:MApostolik@ml.com) or Scott Tobin, Financial Advisor / [scott.tobin@ml.com](mailto:scott.tobin@ml.com) / (520) 747-6130

### **RBC Capital Markets, LLC**

Broker name: RBC Wealth Management  
3430 East Sunrise Drive, Suite 250  
Tucson, AZ 85718

If your broker would like a contact name or number: Bobby Present, Senior Vice President – Financial Advisor / (520) 615-4338 / [Robert.present@rbc.com](mailto:Robert.present@rbc.com)

### **USB Financial Services Inc.**

Broker name: Rottenstein Wealth Management & Consulting  
2480 E. Skyline Drive, Suite 200  
Tucson, AZ 85718

If your broker would like a contact name or number: Myron Rottenstein or Aaron Rottenstein, Financial Advisors / (520) 748-3654 Anne Shivers, Client Associate / (520) 750-7500