

Security Delivery Instructions
for Charitable Gifts to
CONGREGATION ANSHAI EMETH

ATT : _____ (My Financial Advisor)

RE : _____ (My Account Number)

Please transfer my gift of securities (listed below):

DESCRIPTION OF SECURITIES

OF SHARES

To : DTC Clearing # 0015

CONGREGATION ANSHAI EMETH GIFT FUND

Account # 416-XXX412-150

(Contact Temple Office for full account number)

Please apply my charitable contribution for the following use:

_____ Member Dues
_____ General Fund

_____ Rabbi Fund
_____ Other (please advise)

Appreciated securities are perhaps the most cost-effective assets to use when making a gift to the Temple. When you donate stocks, bonds or other securities, you could receive a charitable deduction for their full market value and you incur no capital gains tax (subject to IRS deduction limits). Consult your tax advisor to determine that your contribution is deductible to the fullest extent allowed by law.

Electronic security delivery does not always identify the donor. So we are advised of your donation and its intended use, please provide us with a copy of this form. Questions about transfers can be directed to:

Michael Bork

Senior Vice President - Portfolio Manager
Financial Planning Specialist
Financial Advisor

NMLS # 1262214

Morgan Stanley Wealth Management, LLC
401 Main Street – Suite 1000
Peoria, IL 61602

(800) 527-3579 / (309) 671-2862

(309) 517-0521 Fax

michael.bork@morganstanley.com

Donor Signature

Date