

## **Stock Transfer Instructions to Temple Micah**

Giving appreciated shares to the Temple is a wonderful way to fulfill your dues pledge or make other contributions to Temple Micah, and the procedure to do so is relatively easy. Here's what to do.

**First, you'll need to send a letter of instruction to your broker referencing our account to transfer the shares to:**

**Charles Schwab  
DTC # 0164  
Account No. 4919-3191  
Re: Temple Micah Congregation**

**Second, immediately notify the temple of your plans.**

We need to know so that the shares can be sold promptly, and so we can properly identify you as the donor of an incoming gift and allocate it to your account accordingly. The dollar amount reflected on your account will be the average value of the shares on the day the gift is received.

Send notification and allocation instructions to Rhiannon Walsh at **Walsh@templemicah.org**. Please include the following:

- (1) Your name
- (2) Date of transfer
- (3) Name of the stock(s)
- (4) Number of shares being sold
- (5) Approximate amount expected from proceeds of sale
- (6) How the temple should apply the funds to your account

If you have any questions, please call Rhiannon Walsh, Bookkeeper, at 202-342-9175.