

# Stock Gift Instructions

## Instructions for making a gift of stock to Sholom Foundation or

Please call the Sholom Foundation at 952-939-1593 to let us know the name of the stock and how many shares you are transferring so we can instruct our representatives at Fund Evaluation Group to watch for the stock. Have you or your broker complete the following form and fax the information on the form to: **513-977-4412**

DATE: \_\_\_\_\_

MEMO TO: Managed Portfolios Client Service Team, Fund Evaluation Group, LLC  
FAX: 513-977-4412  
RE: GIFTS OF SECURITIES

The following individual (s) will be making a gift of securities to:

Sholom Foundation  
3610 Phillips Parkway  
St. Louis Park, MN 55426  
Phone: 952.939.1593

Donor:

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Please indicate the purpose for the stock gift if other than for general purposes:

\_\_\_\_\_

\_\_\_\_\_

Name of the security: \_\_\_\_\_

Quantity: \_\_\_\_\_ # of shares

Brokerage Firm: \_\_\_\_\_

Broker's Name: \_\_\_\_\_

Broker's Phone: \_\_\_\_\_

Either the individual named above or their broker will be contacting you to coordinate the transfer of the securities.

**BROKER DELIVERY INSTRUCTIONS:**

(DTC eligible securities only. For all other types of securities contact: Managed Portfolios Client Service Team; [ManagedPortfolios@feg.com](mailto:ManagedPortfolios@feg.com) / 513.977.4400.

FIDELITY INVESTMENTS

DTC#: **0226**

ACCOUNT NUMBER: **676-209466**

ACCOUNT NAME: **Sholom Foundation** - Fed. ID # 36-3411361

**PLEASE INCLUDE A COPY OF THIS STOCK TRANSFER RELEASE WITH STOCK TRANSFER; OR,  
MAKE SURE TO INCLUDE THE NAME OF THE STOCK DONOR, STOCK NAME, AND NUMBER OF  
SHARES DONATED WHEN TRANSFERRING STOCK TO FIDELITY INVESTMENTS.**