

# Securities Transfer Instruction Letter

When completed and signed, this form will serve as your transfer instructions to the firm holding assets. To initiate the transfer, mail the original form to your financial advisor and a copy to CNS. If you need assistance, call 503.246.8831 or send an email to [frothstein@nevehshalom.org](mailto:frothstein@nevehshalom.org).

Date: \_\_\_\_\_

To: Financial Advisor: \_\_\_\_\_

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

Phone: (\_\_\_\_) \_\_\_\_\_

Cc: Fred Rothstein at [frothstein@nevehshalom.org](mailto:frothstein@nevehshalom.org) or fax to 503.246.7553.

Re: \_\_\_\_\_ (Your Brokerage Account Name and Number)

Dear Financial Advisor:

I (we), \_\_\_\_\_, would like to make a gift to Congregation Neveh Shalom (CNS). Please transfer the following securities from the above referenced account to CNS's account at RBC Wealth Management, DTC # 0235 for A/C Congregation Neveh Shalom account # 30784816. Please disclose my (our) names to CNS and include the name(s) in the transaction description of the transfer.

Number of Shares	Security Name	Stock Symbol/ Cusip Number
_____	_____	_____
_____	_____	_____
_____	_____	_____

Cash in the amount of \$ \_\_\_\_\_

For additional assistance, or to donate physical stock certificates or securities not held in a brokerage, please contact Brian Suher at RBC Wealth Management at 503.223.7711.

If you have any questions regarding these instructions please call me at \_\_\_\_\_(phone).

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\*To enable us to properly credit your gift and ensure prompt processing, **please notify CNS prior to initiating your transfer.\***