

**Give graciously, cheerfully, and sympathetically. – Maimonides**

## **Appreciated Assets**

Donating appreciated assets can offer significant tax advantages. Donations of appreciated, publicly traded securities are one of the most tax-wise methods. The most common forms of these assets are shares of stock, bonds and mutual funds.

If you donate assets that have increased in value since you bought it more than a year ago – and if you itemize deductions – you can take a charitable deduction for the stock's fair market value on the day you give it away. You will also avoid capital-gains taxes on the increase in value over time, which you would have had to pay if you sold the stock then gave the charity the cash proceeds. If you have held it for less than a year, your deduction is limited to your cost basis -- what you paid for the stock --not the current value.

**Prior to the transfer, please send an email to Melissa Tone at [mtone@ncjw.org](mailto:mtone@ncjw.org) with the following information.**

- Donor Name
- Date NCJW Inc. should expect the wire
- Name of Asset
- Number of Assets
- Estimated dollar amount
- Broker Name
- Broker Organization
- Broker Telephone Number and/or Email
- Intended Purpose, if the donation is for a specific fund or campaign
  - For Example: 125<sup>th</sup> Campaign, Board Commitment, Israel Granting

**The NCJW Finance and Development staff may anticipate the arrival of this gift and confirm receipt to the donor, if desired.**

Financial brokers transfer these assets using the guidelines below. Upon being received, the assets are sold. The total donation is the value of the sale. NCJW Inc's broker is Glenmede. Transfer information for various assets are listed below. Please be mindful of the items that must be included with the transfer of assets.

### **FINANCIAL BROKER**

The Glenmede Trust Company, N.A.  
1650 Market Street, Suite 1200  
Philadelphia, PA 19103  
Tax ID: 051-0390823

**TRANSFER INFORMATION**

<b>ALL DTC(Depository Trust Company) SECURITIES</b>	
Account Name	NATL COUNCIL OF JEWISH WOMEN GIFT !M
Account Number:	4319-01-4/5
DTC	#2139
Agent Bank	#12286
Institutional ID	#12286
MUST INCLUDE	Client Name and Glenmede Account Number

<b>OPEN-END MUTUAL FUNDS</b>	
Account Name	NATL COUNCIL OF JEWISH WOMEN GIFT !M
Account Number:	4319-01-4/5
Institution	National Financial Services/Fidelity
Contact	Marie Knuttel
Telephone	(215) 419-6088
Email	gtctransfers@glenmede.com
Fidelity NFS Contact	(866) 755-6372
MUST INCLUDE	Account Name and Glenmede Account Number

<b>FEDERAL BOOK ENTRY SECURITIES</b>	
Account Name	NATL COUNCIL OF JEWISH WOMEN GIFT !M
Account Number:	4319-01-4/5
Institution	Northern Chicago Trust 50 South La Salle Street, Chicago, IL 60603
ABA	#071000152
AC	#26-98051 The Glenmede Trust Company, N.A.
MUST INCLUDE	Account Name and Glenmede Account Number

<b>FEDERAL-WIRED MONIES</b>	
Account Name	NATL COUNCIL OF JEWISH WOMEN GIFT !M
Account Number:	4319-01-4/5
Institution	Northern Chicago Trust 50 South La Salle Street, Chicago, IL 60603
ABA	#071000152
Account	35114149
BNF	The Glenmede Trust Company, N.A.
MUST INCLUDE	Account Name and Glenmede Account Number