

Making Gift to CCJDS with Stocks, Bonds or other Publicly-Traded Securities

A gift of securities (transferred from you directly to CCJDS) may entitle you to eliminate capital gains tax while yielding a charitable deduction. (Please consult your tax professional for details.) Many donors choose this route. Should you generously consider transferring publicly-traded securities, we ask you follow this simple 3-step procedure:

- 1) **Please call CCJDS Development Director Eden Bruner (925-284-8288)**, or email her at eden@ccjds.org, to let her know that you plan to transfer stocks/bonds/mutual funds into the school's account as a donation. Indicate if this will be a gift or payment on pledge, and whether the donation is to the operating (annual campaign) or capital account of the school. **If you do not receive an email confirmation back within 24 hours, please call.**
- 2) **Call your broker** with the following instructions:
 - a. **Call Mike Simon or Cyle Sherman at Morgan Stanley (925-746-2900)**
 - b. **Transfer Assets** to:
Account Name: Contra Costa Jewish Day School
DTC: Direct Transfer Code 0015
Account Number: 125-017787
- 3) **Please ask your broker to remind Morgan Stanley to inform CCJDS that you made the transfer.** Your broker can contact Eden Bruner at CCJDS (925-284-8288) after the transfer.

NOTE: The receiving broker, Morgan Stanley, will sell all transferred securities upon receipt. The proceeds are sent immediately to Contra Costa Jewish Day School at: 955 Risa Road, Lafayette, CA, 94549.

The donor will be given credit for the funds received by the school in a Thank You letter sent within two weeks of receipt of funds.

The Contra Costa Jewish Day School is a 501(c)(3) non-profit organization (Federal Tax ID 94-3375313). Contributions are tax-deductible to the extent allowable by law.

Making Gifts by Check

Please send your check payable to "CCJDS" to Contra Costa Jewish Day School, 955 Risa Road, Lafayette, CA, 94549. Thank you!