



# CJP Donor Advised Fund Asset Transfer Instructions

Please indicate below how you would like to make your contribution to your Donor Advised Fund and share this document with the CJP team according to the below asset transfer instructions.

### CASH:

By Check: \$ \_\_\_\_\_

Please make your check payable in U.S. dollars to Combined Jewish Philanthropies with the fund referenced by name in the memo field or on an enclosure and mail your check to:

Combined Jewish Philanthropies  
P.O. Box 723  
Reading, MA 01867-0413

By Wire: \$ \_\_\_\_\_

Before initiating a wire transfer, you must contact José Santiago at 617-457-8858 or JoseS@cjp.org to let him know to expect a wire transfer from you. Then use the following bank information:

Bank: Eastern Bank  
Account number: 5634601  
Account name: Combined Jewish Philanthropies  
ABA number: 011301390

### SECURITIES:

Company Name \_\_\_\_\_ Ticker \_\_\_\_\_ # of Shares \_\_\_\_\_

Company Name \_\_\_\_\_ Ticker \_\_\_\_\_ # of Shares \_\_\_\_\_

Company Name \_\_\_\_\_ Ticker \_\_\_\_\_ # of Shares \_\_\_\_\_

Please contact [StockGifts@cjp.org](mailto:StockGifts@cjp.org) for further instructions. Once you have let CJP know to expect your securities, please transfer to the following account:

Account name: Combined Jewish Philanthropies  
Tax I.D. number: 04-2103559  
Brokerage firm: Fidelity Investments/NFS  
Account number: 101-077496  
DTC number: 0226

Note, for those looking to transfer mutual funds, some mutual fund transfers can take weeks to complete. Please contact [StockGifts@cjp.org](mailto:StockGifts@cjp.org) for instructions.

### OTHER ASSETS:

\$ \_\_\_\_\_ Description: \_\_\_\_\_

Please contact [StockGifts@cjp.org](mailto:StockGifts@cjp.org) for further instructions.