



M E N O R A H  
P A R K

**MEMORANDUM**

**To: Our Donors**  
**From: Joel Fox, Executive Director**  
**Date: July, 2016**  
**RE: Stock Donations**

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We appreciate our donors' support and wish to make all transactions easy. Here are instructions for you to give your broker when you wish to donate stock, so the brokerage can transfer the shares into our account. This avoids capital gains tax you might owe if you sell the stock outright.

**PLEASE ALERT US WHEN YOU ARE MAKING THESE ARRANGEMENTS. WE SOMETIMES RECEIVE BROKERAGE CHECKS WITHOUT THE DONOR'S NAME OR ANY INSTRUCTIONS.** We want to be able to thank you and use the donation as you desire.

**To Transfer Appreciated Stock to our Brokerage Account**

Ask your Broker to transfer the shares to

**Menorah Park Foundation UBS Brokerage Account # NG-04468-56**  
**DTC Clearing # 0221**  
Broker: Michael Shames 216-292-1283.  
Michael's Assistant is Tammie Bond 216-292-1258. Fax # 216-896-0371  
UBS Office: 30050 Chagrin Blvd. Suite 200, Pepper Pike, OH 44124