



Donating Securities to TBA

Temple Beth Ami invites you to donate securities to TBA to pay dues or tuition or to make a donation to the congregation. Please contact your financial and/or tax advisor to learn more about the benefits for you of donating securities.

Per TBA's investment policy, all securities are sold upon receipt with cash proceeds being directed by the donor for appropriate allocation.

If you would like to donate securities to TBA, please notify Executive Director Debbie Ezrin to inform her of the pending transaction and how you want TBA to allocate the cash proceeds. Then provide the following information to your broker:

- Receiving Firm: Morgan Stanley
- Receiving Firm DTC: 0015
- Receiving Account Number 530-156663 (123) Contact Debbie Rose 301-657-6352

Thank you in advance for giving generously to TBA!