



Gifting Securities to Greenwich Reform Synagogue

Thank you for your decision to gift securities to Greenwich Reform Synagogue. These instructions are for making the gift to the GRS Vanguard brokerage account.

1. The gift/transfer is initiated by the broker who holds the securities now. Call/email your broker to get started.
2. Your broker will need to know:
 - a. Account name: Greenwich Reform Synagogue
 - b. Account number: **57503209**
 - c. DTC number for Vanguard: **0062**.
3. Your broker can then transfer the securities to the GRS account at Vanguard.
4. **IMPORTANTLY**, please let the GRS Temple administrator (admin@grs.org) know the following:
 - Name and ticker of securities transferred
 - Number of shares and approximate value
 - Date transfer is initiated
5. If you are trying to meet a year-end deadline, please don't wait until the last minute—it may take your broker a few days to process the transfer.

Most publicly traded securities can be gifted. Following a list of those that can be, and those which may be restricted. Please let the GRS Administrator (admin@grs.org) know about the gift, so we can keep an eye out for it, and let you know when it has been received.

Again, thank you for your generosity.

Investments you can transfer in kind include:

- Stocks
- Bonds
- Most options
- Exchange-traded funds (ETFs)
- Unit investment trusts
- Certificates of deposit (CDs) held in a brokerage account
- Most mutual funds (although money market funds will be sold and transferred as cash) *

Investments you can't transfer in kind include:

- CDs held directly with a bank
- Certain options
- Limited partnerships and private placements
- Certain mutual funds and other investment products offered exclusively by your current firm
- Certain low-priced securities traded over the counter (OTC) or on the pink sheets market
- Commodities
- Annuities
- Life insurance policies