



# TEMPLE EMANUEL

## **Paying Dues and Making Donations with Stock or Securities**

At Temple Emanuel, we are deeply grateful for the generosity of our members and donors. In addition to traditional methods of payment by check or credit card, we welcome contributions through stock and other securities transfers. Making a gift of appreciated securities can provide meaningful support to Temple Emanuel while offering tax advantages to the donor.

### **Benefits of Donating Appreciated Securities**

- **Tax efficiency:** You may be eligible to avoid paying capital gains tax on the appreciated value of securities held more than one year.
- **Charitable deduction:** In most cases, you can claim a charitable deduction for the full fair market value of the securities at the time of transfer.
- **Maximizing impact:** Your gift helps Temple Emanuel sustain programs, services, and our sacred community while offering a potentially more efficient way to give.

### **How to Make a Stock Transfer**

To make a donation or pay synagogue dues through stock, please instruct your broker to transfer the securities directly to Temple Emanuel's brokerage account.

### **Temple Emanuel Account Information**

<b>EIN Number:</b>	04-2121646
<b>Brokerage Firm:</b>	Charles Schwab 1262 Boylston Street, 1st Floor Chestnut Hill, MA 02467 (617) 713-3300
<b>DTC Number:</b>	0164-code 40
<b>Account Name:</b>	Temple Emanuel
<b>Account Number:</b>	8789-2045

Once your transfer is complete, please email our Finance Office with the following details at [Finance@TempleEmanuel.com](mailto:Finance@TempleEmanuel.com)

- Your name and contact information
- The name and number of shares being transferred
- The purpose of your gift (e.g., dues, Annual Appeal, endowment, or other designation)

This step ensures we can identify your gift and properly acknowledge your contribution.

### **Gifts of Maturing Securities, Bonds, or Mutual Funds**

If you hold securities, bonds, or mutual funds approaching maturity, these can also be directed to Temple Emanuel in support of your dues or a donation. The Finance Office will be glad to discuss timing, valuation, and transfer procedures to ensure your gift is processed smoothly.

### **Important Notes**

- Please consult your financial advisor or tax professional for guidance specific to your situation.
- For year-end giving, allow sufficient time for the transfer to be completed by December 31. Brokers may require several business days to process your request.
- Temple Emanuel's staff is available to provide transfer instructions and confirm receipt, but we cannot offer tax or legal advice.

### **Contact Us**

If you have questions about making a gift of stock, bonds, or other securities, or would like to notify us of a pending transfer, please contact:

#### **Temple Emanuel Finance Office**

Email: [Finance @TempleEmanuel.com](mailto:Finance@TempleEmanuel.com)

Phone: 617-558-8112

Thank you for your generosity and commitment to sustaining Temple Emanuel's vibrant community.