



Sidney Albert  
Albany JCC



## Giving Securities or Mutual Fund Shares

Please notify the Sidney Albert Albany JCC in advance of making a transfer. We will alert our Custodian to accept the securities and assist in properly acknowledging your gift.

Steve Burkholder, CFO  
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Email: [Stevenb@albanyicc.org](mailto:Stevenb@albanyicc.org)

### **Securities held by your Bank or Broker:**

Securities held by a broker may be delivered by wire through the Depository Trust Company (DTC) to our brokerage account. Instructions should be given as follows:

**Name:** NEUBERGER BERMAN BD LLC  
**Account Number:** NBJ-052816  
**NB Account Number:** 555-56282

**DTC# 0226 / NFS**  
**Sidney Albert Albany Jewish Community Center Endowment Fund/NBJ052816**

### **Valuation and Date of Gift**

Securities that are publicly traded on national exchanges such as the New York Stock Exchange, the American Stock Exchange, or NASDAQ shall be acceptable to AJCC. In general, gifts of securities will be sold soon after receipt. For these publicly traded securities, the value of the gift will be determined in accordance with prevailing law. In no event shall an employee or volunteer on behalf of AJCC commit to a donor that a particular security will be held by AJCC unless expressly authorized to do so by the Executive Committee.

Questions? Please feel to reach out to our Development Team

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