



**Cure JM Contact:**

Shannon Malloy, Development Director

[Shannon.Malloy@curejm.org](mailto:Shannon.Malloy@curejm.org)

Cell: (512) 709-1905

We are happy to assist at any point and appreciate your patience with this process.

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**To make a gift of mutual fund shares to Cure JM, there is one extra step required compared to a stock transfer.**

Because each mutual fund requires a unique processing number, we ask that you first contact Shannon Malloy at [shannon.malloy@curejm.org](mailto:shannon.malloy@curejm.org) with the mutual fund name and ticker symbol. Our team will then generate the required information (BIN number) needed by your brokerage firm to complete the transfer.

Please note that mutual fund transfers often take additional time to process. To allow for year-end bank holidays and processing delays, we kindly request notification by December 10 for mutual fund gifts intended for the current tax year.

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**To make a gift of stock**, please use the following instructions and inform [Shannon.Malloy@curejm.org](mailto:Shannon.Malloy@curejm.org) of the gift so we can ensure accurate processing. To allow for year-end bank holidays and processing delays, we kindly request notification by December 15 for stock gifts intended for the current tax year.

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[Broker's Name]

[Brokerage Firm Name]

[Broker's Address]

[Date]

Dear [Broker's Name],

I am writing to formally express my intent to make a charitable gift of the following securities to Cure JM Foundation, IRS Tax ID #35-2222262. Please consider this letter as my authorization to initiate the transfer of the following securities to Cure JM's designated brokerage account:

- Security Name: [Name of Stock, Mutual Fund, or Bond]
  - Ticker Symbol: [Ticker Symbol]
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- Number of Shares: [Number of Shares]

I request that these shares be transferred from my account to Cure JM Foundation's account at First County Bank with the following instructions:

- Receiving Firm Name: First County Bank
- Receiving Institution Account Number: 44-89970 (Also referred to as Account at Agent Bank)
- Receiving Firm DTC #: 2669
- Receiving Firm Address: 3001 Summer St, Stamford, CT 06905
- For the Benefit of: Cure JM Foundation
- Account #: 1649
- Additional details: Transfer asset(s) in kind
- **Note**, for a mutual fund gift, Cure JM will also provide a BIN number for the transaction. The BIN number comes from Matrix and is unique for each mutual fund.

Please coordinate with Cure JM to ensure the proper transfer of these securities. If you require any additional details, please contact Cure JM at **Shannon Malloy, Shannon.Malloy@curejm.org or by cell (512) 709-1905**.

Thank you for your assistance in facilitating this donation. Please confirm once the transfer has been completed.

Sincerely,  
[Name]