



Stock Donation Information

To pay dues or contribute to Temple Beth El of Williamsburg, you can donate unsold securities – stocks, bonds, and mutual funds – directly for the market value of the securities without capital gains tax payment.

Procedure:

1. Notify your brokerage that you wish to submit a “Letter of Instruction”.
2. Inquire about specific information needed for the transfer.
3. Securities to be transferred to:

LPL Financial Account Name: Temple Beth El of Williamsburg

LPL Financial Account Number: 7692-3707

DTC Number: 0075

4. Your brokerage will make the transfer per your instructions and securities will appear in the Temple’s account. You will receive credit for the worth of the securities at the closing of the day received by LPL Financial.

Questions? Please call the synagogue office at 757-220-1205.