



Instructions for Contributing Stocks or Bonds to B'nai Torah MetroWest

We have a dedicated account with Charles Schwab that can receive contributions in the form of stocks, bonds, or mutual funds to be sold with the cash proceeds then transferred directly to BTM's bank account.

From another Charles Schwab account, you can initiate a direct transfer using the BMT account number below.

From another financial institution, you must provide your broker with written instructions including the BTM account number and DTC number below.

Account Name: B'nai Torah Metrowest

Account # 3173-2371

DTC # 0164; Code 40

After you have scheduled or executed the transfer, notify Paul Fuhrman at paul@myfuhrman.com or 617-947-5802. While we cannot commit to a precise time to sell, in most cases the sale will be executed within a few hours of your email or phone call. If the market is closed, the sale will be at the next market open.

You will receive a letter or email from BTM showing the amount of your contribution or payment. Trades are no-fee, so the contribution amount will be equivalent to market value at the time of the sale. Tax implications are your responsibility.

If you have any questions, call Paul Fuhrman at 617-947-5802 or BTM at 508-203-1833.