

Sample Letter for Financial Advisor

Dear:

I would like to make a gift of stock on [insert date] to the Anti-Defamation League Foundation. Please transfer [number] shares of [company name] to the charity in [indicate month, year when you would like transfer to occur].

It is important to contact the Director, National Planned Giving, Legacy and Endowments at the Anti-Defamation League Foundation, as he/she will advise you to the proper account to which this should be transferred. He/she can be reached at 1-888-235-9710.

The charity will also provide me with a receipt for this gift.

Thank you for your prompt attention to this matter.

Sincerely,

cc: Director, National Planned Giving Legacy and Endowments