

**INSTRUCTIONS FOR MAKING A GIFT OF SECURITIES TO THE  
YMCA of the Greater Twin Cities  
(Revised December 2016)**

**1. Notify us of your plans.**

Inform the YMCA of the specific property you plan to contribute: number of shares and name of issuing company.

**2. Electronically Transferred Securities to the YMCA of the Greater Twin Cities.**

Publicly Traded Securities Held in a Brokerage Account

Send your broker a stock gift letter specifying the securities to be transferred and purpose of your gift—e.g. “for camp scholarships.” Send a copy of the gift letter to Melody Hanks, YMCA of the Greater Twin Cities, 30 South 9<sup>th</sup> Street, Minneapolis, Minnesota, 55402. (A sample gift letter to the broker is attached for your use.)

If possible, please have the securities transferred electronically directly to the YMCA’s account with Wells Fargo Securities, as listed below. This minimizes sales charges and administrative costs to the YMCA, so that more of your gift can be put to its intended use.

**Our account number is: 8813-9222**  
**Our DTC number is: #0141**  
**Broker: Karen Neff**  
[karen.neff@wfadvisors.com](mailto:karen.neff@wfadvisors.com)  
**515-254-9400**

The brokerage firm should notify Melody Hanks at 612-371-8753 or [Melody.Hanks@YMCAMn.org](mailto:Melody.Hanks@YMCAMn.org) once the transfer occurs. The YMCA will then issue a sell order upon receipt of transfer. It is important that the donation of securities be addressed to the YMCA of the Greater Twin Cities, the legal entity of all branches for ease of ownership transfer.

The Mission Advancement office will notify in writing the designated branch of the transaction.

**3. Publicly Traded Stock Held in Certificate Form**

If you wish to contribute all shares represented by a certificate registered in your name, simply mail the unsigned stock certificate to the YMCA of the Greater Twin Cities by certified mail, along with a gift letter identifying the securities you are contributing as well as the purpose of your gift. If mailing the unsigned stock certificate, please also mail a signed stock power form in a separate envelope.

If you are delivering the certificate in person, we will have you execute the certificate once at the YMCA's office in order to complete the transfer. To execute the certificate, we will have you sign the back of the certificate. We will also need you to bring a gift letter and it must be signed exactly as your name appears on the front of the stock certificate.

If you plan to contribute only a portion of the shares represented by your stock certificate, you will need to have a new certificate issued in the YMCA's name by a transfer agent or the issuing corporation.

Or, you can take the stock certificate to your broker with a gift letter specifying the number of shares to be transferred and the intended use at the YMCA. Once the certificate has been executed, your broker can put the securities into your account and transfer the desired number of shares to the YMCA as outlined in item #2 on this memo.

## SAMPLE LETTER TO MAKE A GIFT OF SECURITIES

Your Name  
Address  
XXXXXXXXXXXXXX  
XXXXXXXXXXXXXX

Date

Name of Your Broker  
Name and Address  
Your Brokerage Firm

Dear xxxx,

I would like to make a charitable gift of securities to the YMCA of the Greater Twin Cities, to be used for (specify branch, campaign, or other special restrictions).

The Gift is (list # shares, name of stock, and Symbol).

My account # is \_\_\_\_\_.

The account number with Wells Fargo Securities for the YMCA of the Greater Twin Cities is 8813-9222, DTC 0141. The Account Executive for the YMCA of the Greater Twin Cities is Karen Neff.

If you have any questions, please call me at \_\_\_\_\_.

Your Name and Signature

CC: Melody Hankes  
YMCA of the Greater Twin Cities  
30 South Ninth Street  
Minneapolis, MN 55402  
FAX (612)-371-8716  
[Melody.Hankes@YMCAMn.org](mailto:Melody.Hankes@YMCAMn.org)