



**INSTRUCTIONS FOR MAKING A GIFT OF SECURITIES TO THE
YMCA of the Greater Twin Cities
(October 2018)**

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 security 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 Royse, YMCA of the Greater Twin Cities, 651 Nicollet Mall, Suite 500, 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 Advisors, 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

515-254-9400

The brokerage firm should notify Melody Royse at 612-371-8753 or Melody.Royse@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

To coordinate delivery of physical certificates, please contact our broker, Karen Neff

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
XXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXX

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 Royse
YMCA of the Greater Twin Cities
651 Nicollet Mall, Suite 500
Minneapolis, MN 55402
FAX (612)-371-8716
Melody.Royse@ymcamn.org