



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

Valley of the Sun YMCA Stock or Mutual Fund Transfer Instructions

Thank you for donating a gift of stock to Valley of the Sun YMCA!
Please follow these steps to make sure your gift is received and recognized properly.

STEP 1: Complete the Securities Contribution form and give to your broker

Complete the form on pages 2-3 of this document *and submit them to your broker*, who will then initiate the transfer to the YMCA account.

STEP 2: Notify the YMCA of your intent to gift stock

It is important to notify the Financial Development Department of the gift being transferred.

You can contact the Y through these channels:

Valley of the Sun YMCA
Financial Development Department
350 N First Avenue
Phoenix, AZ 85003
E-mail: StockDonations@vosymca.org
Phone: 602-212-5114
Fax: 602-257-5136

STEP 3: Gift Acknowledgement Receipt

Once the gift is received (gift of stock or mutual funds is transferred, sold and check received by the YMCA, which can take 1-2 weeks), the Valley of the Sun YMCA will provide you with a receipt for this gift.



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Valley of the Sun YMCA Securities Contribution Form

Please help us accurately process and recognize your gift by completing this form.

Thank you for your interest in contributing securities to the Valley of the Sun Young Men’s Christian Association. When you are ready to transfer your gift PLEASE CONTACT Beth Haugen with Valley of the Sun YMCA at 602-212-5114 or bhaugen@vosymca.org to ensure your donated securities receipt will be timely. Please print clearly and complete all of the following information. Please note that Mutual Fund shares are acceptable as a gift, but some funds may require re-registration and may affect your date of gift amount.

DONOR INFORMATION: _____

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Daytime Phone: _____ Fax: _____

Email: _____

I/we _____ (name), hereby authorize my/our
broker at _____ (brokerage firm) to transfer on this _____
day of _____ from my/our account number _____
_____ (day/month/year & account #) to the following

**Valley of the Sun Young Men’s Christian Association account at Charles Schwab and Co,
Inc. Account #9960-5170**

**DTC Participant #: 0164, code 40 (free and clear)
All DTC deliveries must include the account name (Valley of the Sun Young Men’s
Christian Association) and our Schwab account number.**

**Fed Wires must include the account name (Valley of the Sun Young Men’s Christian
Association) and our Schwab account number.**

Wire to:

**Bank: Citibank NA
111 Wall Street New York, NY 10043
ABA#: 021000089
FBO: Charles Schwab & Co., Inc.
A/C#: 40553953
For the Account of: Valley of the Sun Young Men’s Christian Association
Schwab A/C#: 9960-5170**



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In addition, I/we hereby authorize my/our broker to release my/our name to the **Valley of the Sun Young Men's Christian Association** for **IRS Tax Receipt** purposes.

SECURITIES TO TRANSFER:

Security Name	Number of shares	Estimated Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signature of Donor Signature Jt Donor Date

Thank you for your support!