



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](mailto: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](mailto: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**

