



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

**INSTRUCTIONS FOR MAKING A GIFT OF SECURITIES TO THE
Young Men's Christian Association (YMCA)
of Metropolitan Washington**
(Revised December 2020)

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 Metropolitan Washington

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 Genette Comfort, YMCA of Metropolitan Washington, 1325 W Street, N.W., Washington, DC 20009.

(A sample gift letter to the broker is included for your use.)

If possible, please have the securities transferred electronically directly to the YMCA's account with RBC Wealth Management, 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 DTC number is: 0235

Our account number is: 316-54239

Our account name is: YMCA Metropolitan Washington

Broker: Robert Linn / (301) 309-2629 / robert.linn@rbc.com

The brokerage firm should notify Genette Comfort at 571-435-1712 or genette.comfort@ymcadc.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 Metropolitan Washington, the legal entity of all branches

YMCA of Metropolitan Washington

Association Services Office

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1112 16th Street NW, Suite 720, Washington, DC 20036

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for ease of ownership transfer.

The Philanthropy Department 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 Metropolitan Washington 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.

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SAMPLE LETTER TO MAKE A GIFT OF SECURITIES

Your Name
Address
City, State, Zip

Date

Name of Your Broker
Your Brokerage Firm
Name and Address

Dear xxxx,

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

My account # is _____.

The Gift is (name of stock, stock symbol and list quantity of shares).

Delivery Instructions

RBC Wealth Management / DTC number: **0235**

RBC Account number: **316-54239**

RBC Account Name: YMCA of Metropolitan Washington

The Account Executive for the YMCA of Metropolitan Washington is Thakur Persaud, Vice President of Finance & IT.

If you have any questions, please call me at _____.

Your Name and Signature

CC: Genette Comfort
YMCA of Metropolitan Washington
1325 W Street NW
Washington, DC 20009
Direct Dial: 571-435-1712
genette.comfort@ymcadc.org