



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

YMCA of Snohomish County Stock Transfer Instructions

I. Donors can instruct their financial institution to transfer securities electronically to:

Morgan Stanley
Account # 144-033105
Account Name: YMCA of Snohomish County
DTC # 0015

YMCA Federal Tax ID: 91-0565561

Morgan Stanley
601 Union St Suite 5200
Seattle, WA 98101

Contact Name: Ethan Yamamoto
206-344-3505
Ethan.Yamamoto@morganstanley.com

To ensure that the contribution is receipted in an expedient manner, **please communicate the stock transfer request in writing or email to the YMCA** and include as much information as possible:

- Name of donor
- Name and number of shares donated
- Share valuation
- Designation of support, such as Branch and/or campaign

If emailing, please copy:

Jennifer Willows, Chief Development Officer - jwillows@ymca-snoco.org
Swati Saluja, Chief Finance Officer - ssaluja@ymca-snoco.org
Donor Services – donation@ymca-snoco.org

II. If securities are delivered to YMCA in certificate form and registered in the name of YMCA, the following documents must be presented with each security:

1. Corporate Resolution - completed and signed by an authorizing officer of the YMCA. It must be currently dated (six months) and either bear seal or indicate that there is no seal. Corporate Resolution available upon request
2. Stock Power Form - must be signed by a different officer than one signing Corporate Resolution. Stock Power Form available upon request
3. Letter of instruction authorizing to transfer securities to new ownership.
Sample Letter attached

YMCA OF SNOHOMISH COUNTY

Association Office
PO Box 419, Everett WA 98206-0419
P 425 374 5779 W ymca-snoco.org



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- III. In case of securities being delivered to YMCA in certificate form and registered in the name(s) of a donor (Third Party Transfer), the following documents must be presented with each security:
1. Security must be properly endorsed on the back of certificate or a stock power form must be signed. Stock Power Form available upon request
 2. Authorization to transfer security to YMCA must be completed and signed by all parties registered on the certificate. Security Transfer Authorization Form available upon request



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SAMPLE LETTER

<Month Date, Year>

<Donor Name>
<Address Line 1>
<Address Line 2>
<City>, <State> <ZipCode>

Donor's Broker
Brokerage Firm
Address

Dear Broker:

This is my formal request to you to please transfer from my account # _____ to the brokerage account of the YMCA of Snohomish County (Morgan Stanley, c/o Ethan Yamamoto, DTC #0015, Account #144-033105), a charitable donation of _____ shares of _____.

A copy of this letter has been sent to the YMCA of Snohomish County and to their broker, Morgan Stanley at 601 Union St Suite 5200, Seattle WA 98101.

This gift is intended to support the _____ Campaign.

Sincerely,

Donor Name

Copies:

Swati Saluja
Chief Financial Officer
YMCA of Snohomish County
PO Box 419
Everett, WA 98206-0419

Ethan Yamamoto
206-344-3505
Morgan Stanley
601 Union St Suite 5200
Seattle, WA 98101

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