



YMCA GIFT OF STOCK BROKER INSTRUCTIONS

If you choose to gift shares of stock, or stock options, to the YMCA of Greater Des Moines, you may choose to follow one of the following procedures.

I. Electronic Transfer

A. Notify the Financial Development office at the YMCA of Greater Des Moines, (515-471- 8534). They will need to know the name of the company from whom the shares were issued; the number of shares being given; the name of institution/broker from whom the shares will be received; and the designation of your gift. (i.e. endowment, name of specific YMCA branch, Annual Campaign, Capital Campaign, etc.)

B. Notify your institution/broker to deliver the shares to – Bankers Trust Company, ADDRESS: 453 7th Street, Des Moines, IA 50309, PHONE: 1-800-362-1688

C. Upon transfer, the YMCA of Greater Des Moines will provide you with a receipt acknowledging your gift.

II. Stock Certificate(s)

A. If you possess the Stock Certificates, you may endorse and send directly to: YMCA of Greater Des Moines, Attn: Financial Development Office, 501 Grand Ave. Des Moines, IA 50309

B. Please indicate your gift's designation.

C. Upon receipt, the YMCA will provide you with an acknowledgment of your gift.

III. Stock Options

A. Contact the Financial Development office at 515-471-8534. A form will be sent/faxed to you indicating the appropriate documents to complete. Upon receipt of your completed documents, the YMCA will exercise the option for you and receive the proceeds of the sale.



B. Upon completion an acknowledgment of your gift will be sent to you.

If you would like to make a gift using any of these options, or you have a question, please feel free to contact YMCA Financial Development Office, Vicky Foresman, Vice President of Mission Advancement, Email: Vicky.Foresman@dymymca.org; Phone 515-471-8534.

YMCA GIFT OF STOCK – DONOR INSTRUCTIONS

TO: YMCA of Greater Des Moines Financial Development Office, 501 Grand Ave, Des Moines, IA 50309

RE: DONOR' S STOCK TRANSFER – CONFIRMATION FORM

From: _____ (donor name printed)

Stocks Will Be Issued From (print name of company)

Number of Stocks Being Given: _____

Name of Institution /Broker Processing Your Gift of Stocks:

Phone: _____ Fax: _____

Expected Date of Transfer: _____

Designation of Gift: _____ YMCA Branch of the YMCA of Greater Des Moines

This letter is to confirm the transfer of _____ shares of stock to the above-designated YMCA branch.

The shares were delivered to: BTWM

Upon receipt of the transfer, I understand that the YMCA of Greater Des Moines will send me a receipt acknowledging my gift. If you have any questions, contact the YMCA of Greater Des Moines Financial Development office, 515-471-8534

Donor's Signature _____ Date: _____

