



FOR YOUTH DEVELOPMENT  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

To whom it may concern:

I understand you may be interested in making a contribution with appreciated stock. This can often be a very tax-wise way of giving. The following are the three most common ways in which stock can be transferred to the YMCA's Charles Schwab account.

#### Transfer via DTC

This is an electronic transfer from an account outside of Charles Schwab to the YMCA's account. The shareholder generally signs a transfer form provided by the losing firm, and the shares are then transferred via DTC. Charles Schwab's DTC number is 0164.

#### Transfer from another Charles Schwab account

The shareholder signs a letter of authorization requesting the transfer of shares from his/her Charles Schwab account to the YMCA's account.

#### Certificate form

Certificates are registered in the name of the shareholder, who endorses the certificates on the back. The shareholder must also sign and have notarized a third party release which confirms that they are giving up all rights and interest in the shares.

#### **Charles Schwab Account:**

**YMCA of the Rockies - Account # 9684-2325 (1-800-435-4000)**

YMCA of the Rockies Taxpayer ID# is 84-0404913

Once stock is received by the YMCA, it will be sold at market value as soon as possible. Your gift will be valued at the average of the high and low as listed on the appropriate securities exchange on the date the stock is received by the YMCA.

**Please notify the YMCA of the Rockies when you are making a transfer and let us know the name of the stock being transferred and the number of shares.** This will help us to be on the look-out for your transfer and when it arrives we will know who the stock came from and what it is for. The DTC system does not provide us with the name of the person who transferred the stock.

I hope this is helpful information. Please feel free to call if you have questions, or if you need additional information. I am looking forward to seeing you this summer.

Sincerely,

Chris Jorgensen  
Vice President/CFO

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