

**STOCK TRANSFER INSTRUCTIONS**  
*YMCA of Greater Seattle*

- I. Donors can instruct their financial institution to transfer securities electronically via "DTC" to Wachovia as follows:

Wachovia  
DTC #0141

For further credit to: YMCA OF GREATER SEATTLE  
Account number: 8519-3916

Contact Name: Shawna Bain, Susan Lawrence or Tracy Redding  
Toll Free: (866) 239-7535  
Direct: (425) 369-1423

**To ensure that the contribution is received in an expedient manner, please communicate the stock transfer request in writing or electronically to the YMCA using the Sample Letter on Page 2 as a guide. Information to include in letter or e-mail: name of donor, name and number of shares donated, and campaign for which the donation is being made. If emailing, please copy Scott Zwink, Assistant Controller at [szwink@seattleyymca.org](mailto:szwink@seattleyymca.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 attached*
2. Stock Power Form - must be signed by a different officer than one signing Corporate Resolution.  
*Stock Power Form attached*
3. Letter of instruction authorizing to transfer securities to new ownership.  
*Sample Letter attached*

- III. Third Party Transfer -- In case of securities being delivered to YMCA in certificate form and registered in the name(s) of a donor, 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 attached*
2. Authorization to transfer security to YMCA must be completed and signed by all parties registered on the certificate.  
*Security Transfer Authorization Form attached*

**NOTE: Please contact the Chief Financial Officer at the YMCA (206-382-4928) if you have any questions.**

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 Greater Seattle (Wachovia Securities, c/o Lawrence-Redding Investment Group., DTC #0141, Account #8519-3916), a charitable donation of \_\_\_\_ shares of \_\_\_\_\_.

A copy of this letter has been sent to the YMCA of Greater Seattle and to their broker, Wachovia Securities in Issaquah.

This is an unrestricted gift to the (branch name) YMCA Partners With Youth campaign and may be used in whatever way best suits the needs of the YMCA. **(OR, this gift is specifically for capital campaign, or \_\_\_\_\_).**

Sincerely,

Donor Name

Copies:

Chief Financial Officer  
YMCA of Greater Seattle  
909 Fourth Avenue  
Seattle, WA 98104

Shawna Bain  
(425) 369-1423  
The Lawrence-Redding Investment Group  
Wachovia Securities, Inc.  
1180 NW Maple Street, Suite 170  
Issaquah, WA 98027