



Making a Gift of Stock to the YMCA

By donating securities that have been held for a year or more you have the potential for a tax benefit. If you have securities that have appreciated over time, selling them will generate a capital gains tax liability. Donating these assets directly to the YMCA, rather than selling first, is one way to receive an income tax deduction for the full fair market value of the asset - while avoiding capital gains taxes. The YMCA will then sell the asset and receive full proceeds from the sale. This win-win means more impact from your gift.

Before a Gift is Made

- If you intend to make a gift of securities to the YMCA, please contact the YMCA Development Office (916) 231-0362, or donorrelations@ymcasuperiorcal.org.
- Please let us know the number of shares and the name of the securities you are intending to give and the purpose of your donation.
- By doing so it allows us to identify your gift when the securities are transferred so that we can properly record and acknowledge your gift.

How to Transfer the Securities

Please provide the following information to your broker:

All DTC eligible securities:

DTCC: 0141

Further Credit: YMCA of Superior California

YMCA Tax ID #: 94-1156634

Account: 4208-2456

Donor Name:

Domestic Wire Instructions:

Primary Bank:

Wells Fargo Bank

420 Montgomery Street

San Francisco, CA 94104

ABA Routing Number: 121000248

Beneficiary:

Wells Fargo Clearing House Services, LLC

1 North Jefferson

St. Louis, MO 63103

Account Number: 4122023377

Further Credit: YMCA of Superior California

Account Number: 4208-2456

How Your Gift Will Be Acknowledged

The YMCA will provide you with a statement for tax purposes showing the fair market value of your gift, the date of the gift, and the gift description. For publicly traded securities, value is derived from the average of the high and low value on the date of the transfer.

**Thank you for
supporting the YMCA!**

The purpose of this information is to provide general information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained.

Consult an attorney for advice if your plans require revision of a will or other document.

For questions or information, please call our Development Office at 916-231-0362, or email donorrelations@ymcasuperiorcal.org.