

# Stock Transfer Letter of Instruction

Name of your broker's Firm: \_\_\_\_\_

Address of Firm: \_\_\_\_\_

Street/Post Office Box                      City                      State                      ZIP

Contact Person Name: \_\_\_\_\_

Contact Person Phone Number: \_\_\_\_\_

Contact Person email: \_\_\_\_\_

Donor's Full Name (Please Print) \_\_\_\_\_

To whom it may concern:

Please be advised that I, the undersigned, hereby request that \_\_\_\_\_ shares of \_\_\_\_\_ be transferred from my account to the account of the YMCA of the Triangle, Inc. The purpose of this transfer is to make a charitable contribution to (branch name) \_\_\_\_\_. The gift should be applied to \_\_\_\_\_ fund. Below are instructions on how to make the stock transfer to the YMCA's account.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Directions to transfer stock to the YMCA of the Triangle Area, Inc.

Legal Name:                      Young Men's Christian Association of the Triangle Area, Inc.

Brokerage Firm:                      Merrill Lynch Investments

Location:                      150 Fayetteville Street Mall, Suite 2000  
Raleigh, NC 27601

Account Number:                      #778-04F22

DTC Number:                      #5198

Representative:                      Betty Newberry

Phone Number:                      (800) 836-7813 OR (919) 829-2043

Fax Number:                      (919) 829-2096

Please ask your broker to note on the transfer that the shares are coming from you so that we may promptly credit you with the gift.

PLEASE call Anne Godwin at (919) 719-9642 when you give the order to your broker to make the transfer and let her know the following information:

- Number of shares being transferred
- Name of Securities being transferred
- Brokerage firm making the transfer
- How you want the proceeds to be used by the YMCA

If you have any questions, contact Anne Godwin at (919) 719-9642. Thank you for supporting the YMCA of the Triangle Area!