



YMCA OF SAN DIEGO COUNTY
**COMMUNITY
WELL-BEING**
& BELONGING

GIFTS OF STOCK OR IRA ROLLOVERS TO THE YMCA OF SAN DIEGO COUNTY

(Revised 1/14/2025)

Thank you for deciding to make a gift of stock or an IRA rollover contribution to the YMCA of San Diego County. The two methods of making a gift this way are electronically through your broker or through the actual giving of the stock certificates. Electronically is the easiest method.

In either case our broker is: Darren Pfefferman
Morgan Stanley
4350 La Jolla Village Drive, Suite 1000
San Diego, CA 92122
(858) 597-7754

ELECTRONIC TRANSFER

Your broker will need the following information to carry out your instructions:

Morgan Stanley DTC Number:	0015
YMCA account number:	811-108104-253
YMCA Federal Tax ID Number:	95-2039198

TRANSFER OF STOCK CERTIFICATES

1. Secure and sign a Stock Power and have it signature guaranteed by a brokerage firm or full service bank. (Spouse's signature must be included if the stock is held jointly or in trust.)
2. Send the Stock Certificates to the YMCA along with a brief letter stating you want the stock used as a contribution.
3. Send the signed and signature guaranteed Stock Power to the YMCA in a separate envelope from the stock certificates.

To ensure your gift is designated as intended, please fill out and return the Stock Transfer and IRA Rollover Designation form on the next page. For questions or further information, contact Loena Baranoski, Association Director Philanthropic Services (858) 292-9622 or lbaranoski@ymcasd.org.

We nurture a healthy spirit, mind, and body so all can thrive while honoring our faith-based heritage.

3708 Ruffin Road | San Diego, CA 92123 | (858) 292-YMCA (9622) | www.ymcasd.org



YMCA OF SAN DIEGO COUNTY
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STOCK TRANSFER AND IRA ROLLOVER INSTRUCTIONS

For stock transfers or IRA rollovers, please complete and return this form to:

Loena Baranoski
 YMCA of San Diego County
 3708 Ruffin Road
 San Diego, California 92123
 Email: lbaranoski@ymcasd.org

(PLEASE PRINT)

Donor Name(s): _____

Name of Stock: _____

Number of Shares: _____

Approximate Date of Transfer: ___/___/___ Approximate Value of the Gift: _____

Designated YMCA Branch Name: _____

Designated Purpose:

- | | | |
|---|--------------------------------------|--|
| <input type="checkbox"/> Annual Campaign | <input type="checkbox"/> Entire Gift | <input type="checkbox"/> Specified Amount \$ _____ |
| <input type="checkbox"/> Capital Campaign | <input type="checkbox"/> Entire Gift | <input type="checkbox"/> Specified Amount \$ _____ |
| <input type="checkbox"/> Other: _____ | <input type="checkbox"/> Entire Gift | <input type="checkbox"/> Specified Amount \$ _____ |
| <input type="checkbox"/> Other: _____ | <input type="checkbox"/> Entire Gift | <input type="checkbox"/> Specified Amount \$ _____ |

Signature: _____ Date: _____

Thank you for your generosity and support to the YMCA of San Diego County

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