



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

Stock Transfer Instructions

Thank you for your intent to make a gift of stock to the YMCA of Greater Whittier. Your generosity makes an impact on our entire community.

DTC (Depository Trust Company) Transfer

Step One

Direct your broker or custodian bank to make the transfer to the YMCA of Greater Whittier. Your broker or custodian bank is likely to ask you for a letter of instruction before the transfer can be made. Provide the following DTC transfer information for Caltech to your broker or custodian bank:

Morgan Stanley
1300 Thames St.
Baltimore MD 21231

DTC Participant #: 0015

YMCA of Greater Whittier clearing acc#: 207-026726-136

Reference: (donor name & designation of gift)**

**without this note, gifts are difficult to identify.

Step Two

Notify YMCA of Greater Whittier of your gift. If possible, send a copy of your letter of instructions via:

Email: funddevelopment@ymcawhittier.org

Phone: 562-392-6487

Mail: YMCA of Greater Whittier
Attn: Office of Financial Development
15740 Starbuck Street
Whittier, CA 90603

Please be sure the following information is included in your communication:

- Your Name
- Your Address
- Name of Security
- Number of Shares
- Purpose of the Gift
- Name of Brokerage

PLEASE NOTE: Your gift will be dated according to the day the shares enter the YMCA of Greater Whittier's clearing account at Morgan Stanley. The value of your gift will be based on that date. At busy times of the year, the DTC system can back up.

Year-end gifts: Be sure to allow extra time for the transfer from your broker's account to the Y's Morgan Stanley account, and emphasize to your broker the importance of completing the transfer by December 31. When the 31st falls on a weekend, the transfer should be completed by the preceding Friday.

YMCA OF GREATER WHITTIER

Office of Financial Development: 15740 Starbuck Street, Whittier, CA 90603 | P 562-392-6487 | www.ymcawhittier.org