

YWCA of Greater Portland

Stock Transfer Instructions

Thank you for your interest in making a gift of appreciated securities to the YWCA of Greater Portland. Your support is an investment into helping to change lives.

Here is the information you will need to complete the transaction, as well as a sample of a letter we request you send to the YWCA of Greater Portland to notify us of your securities donation. When we receive a stock transfer, neither the donor's name nor whether the gift is for a specific program is disclosed to us, so a letter will ensure we properly acknowledge and appropriately designate the contribution.

Brokerage Name: Charles Schwab
Telephone Number: 503.721.2430 or 866.232.9890
Account Name: YWCA of Greater Portland
Account Number: 7251-2486 – YWCA of Greater Portland
DTC Number: 0164
Questions: YWCA Development Department @ 503.294.7470

Sample Letter

YWCA of Greater Portland

Development Director

1111 SW 10th Ave

Portland, OR 97205

Dear Development Director:

We will make a gift of _____ (number of) shares of _____ (stock name) stock to the YWCA of Greater Portland, which should be worth about (approx. value). The transfer date of shares will be made into your Charles Schwab account #7251-2486. It will be initiated on (stock transfer date) and should be completed shortly thereafter.

The gift is from us jointly and is an unrestricted contribution.

For questions regarding the transfer, you may contact _____ (broker name) of _____ (broker company) at (broker phone). We can be reached at _____ (donor phone).

Sincerely,

_____ (donor name)

_____ (donor address)