



FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

## Instructions for Donating Stock and Mutual Fund Shares

The YMCA of Western North Carolina (YMCA of WNC) maintains a brokerage account with Morgan Stanley Wealth Management in Asheville, North Carolina for the purpose of processing stock and certain mutual fund contributions to the YMCA of WNC for their Annual Giving Campaign, Endowment Fund, Capital Campaign, or other charitable purpose. Please follow the instructions listed in the following pages in order to make your stock and/or mutual fund contribution.

### Step 1: Transfer stock

- **Electronically**  
Publicly traded stock: Provide your broker with the information shown in Attachment 1 on the top portion of the page. Your broker will inform you if additional information is required.
- **Donations of Physical Securities**  
Physical stock certificates should be delivered to Morgan Stanley Wealth Management at 500 College St., Asheville, NC. Inform them that you wish to make a gift to the YMCA of Western North Carolina through the YMCA's brokerage account with Morgan Stanley Wealth Management (account #: 554-106-164-009). The owner(s) of the shares (as shown on the face of the certificate) must sign a stock/bond power and have their signature(s) Medallion guaranteed by Morgan Stanley Smith Barney. Please also complete the bottom portion of Attachment 1 and deliver it to Morgan Stanley Wealth Management with the stock certificate(s).

### Step 2: Notify the YMCA of WNC

Complete Attachment 2 and send it to the YMCA of WNC at the following address:

By mail: YMCA of WNC  
40 North Merrimon Ave., Suite 309  
Asheville, NC 28804

Fax: 828-251-2437

Email: [kaquino@ymcawnc.org](mailto:kaquino@ymcawnc.org)

Upon receipt of the stock/mutual fund into the account, the stock/mutual fund will be sold and the proceeds credited to the entity you identify in Attachment 2. At that time, the YMCA of WNC will also send you an acknowledgement which complies with IRS regulations.

If you have any questions or need further assistance, please contact Kristen Aquino at 828-210-9653 or email [kaquino@ymcawnc.org](mailto:kaquino@ymcawnc.org).

**Attachment 1: For Electronic Transfers – Notice to Broker**

Please transfer: \_\_\_\_\_ shares of \_\_\_\_\_ Stock

From Account # \_\_\_\_\_

To: Morgan Stanley Smith Barney  
DTC: 0015  
Telephone: 800-841-1462  
Fax: 828-254-0302  
For Further Credit to: YMCA of WNC  
Account # 554-106-164-009

For the Annual, Endowment, Capital or other campaign:

\_\_\_\_\_

Print Name: \_\_\_\_\_

Signature(s): \_\_\_\_\_

**For Gifts of Physical Stock Certificates – Letter of Intent**

I hereby donate \_\_\_\_\_ shares of \_\_\_\_\_ Stock to the YMCA of WNC,  
Annual Giving Campaign Account # 554-106-164-009.

I hereby donate \_\_\_\_\_ shares of \_\_\_\_\_ Stock to the YMCA of WNC,  
Endowment Fund Account # 554-106-164-009.

I hereby donate \_\_\_\_\_ shares of \_\_\_\_\_ Stock to the YMCA of WNC,  
Capital Account # 554-106-164-009.

Print Name: \_\_\_\_\_

Signature(s): \_\_\_\_\_

## Attachment 2: Notice of Stock/Mutual Fund Gift to YMCA of WNC

### Mail this page to:

By mail: YMCA of WNC  
Attn: Kristen Aquino  
40 North Merrimon Ave., Suite 309  
Asheville, NC 28804

Fax: 828-251-2437  
Email: [kaquino@ymcawnc.org](mailto:kaquino@ymcawnc.org)

Name/Entity making the gift: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Quantity & stock/mutual fund donated: \_\_\_\_\_

How donated: Electronically: Yes \_\_\_\_\_ No \_\_\_\_\_

If no, certificate delivered to Morgan Stanley Wealth Management located at:

\_\_\_\_\_

If electronically, donor's broker/agent: \_\_\_\_\_

Broker/agent's telephone: \_\_\_\_\_

Date of gift: \_\_\_\_\_

Beneficiaries/restrictions: \_\_\_\_\_

Total # of shares: \_\_\_\_\_

#### Gift Restrictions:

Area of Greatest Need

Annual Campaign

Health Programs

Youth Programs

YMCA Center/Other: \_\_\_\_\_

YMCA Endowment & Heritage Club

In memory/tribute of: \_\_\_\_\_