

New Canaan Community YMCA

Instructions for Charitable Gifts of Securities

1. *Inform the YMCA Development Office that you are planning to transfer securities.*

When you know the specific name and number of shares please call (203) 966-4528 and speak with Susan Cossette Eng, ext. 142, or email seng@newcanaanymca.org

2. *If the stock is held in a Merrill Lynch account:*

Donor must send a letter of authorization to the financial consultant handling his/her account requesting the transfer of the stock position to the following Merrill Lynch account:

Account No.: 877-04901
Title: New Canaan Community YMCA

3. *If the stock is held in a non-Merrill brokerage/bank account:*

Donor instructs his/her broker in writing to transfer the stock via the “DTC” system as follows:

Merrill Lynch
DTC No. 5198

Account No.: 877-04901
Title: New Canaan Community YMCA

4. *If the stock is in certificate from registered in donor's name:*

Donor must sign certificate or stock power exactly as registration reads on face of certificate, fill in “Merrill Lynch” on the “attorney to transfer” blank and accompany it with a copy of the letter of gift from donor to the YMCA.

Please do NOT endorse the certificate over to the YMCA. If done that way, the transfer agent will require additional signatures by a YMCA officer as well as an original and updated corporate resolution for each gift. This will result in slowing down the actual receipt of the gift thereby putting the amount of the contribution at risk due to changes in the market.

If you need more information, please call Paul Ceglarski at the Stamford Merrill Lynch office at (203) 356-8781.