

giving at the ywca – securities

Gifts of securities are useful because federal tax law permits taxpayers who itemize to deduct the current value of charitable contributions from their adjusted gross income. Stock contributors may owe no tax on the difference between what they paid for the donated stock and its current fair market value (FMV); i.e. there may not be tax on the capital gains.*

Instructions for Making a Gift of Securities

To help you facilitate your gift of stock, please use the following three step process. For help, please call Brian Starr, Major Gifts Officer, at 312.762.2710.

Step 1. Make your Intentions Known

For auditing purposes, the donor or the transferring broker must send a letter with this critical information before a gift of securities is made:

1. Donor(s) name and complete address.
2. Name and number of securities transferred.
3. Specific YWCA program to which the gift should be directed, if any.

Fax this information to 312.762.2710 or mail to YWCA Metropolitan Chicago, ATTN: Development, 1 North LaSalle, Suite 1150, Chicago, IL, 60602.

Step 2. A representative from the YWCA Metropolitan Chicago will contact you

After learning of your intention to make a gift of securities, we will contact you by telephone with 48 business hours to confirm your gift.

Step 3. Deliver your gift of securities

Delivery of Your Gift

Electronic delivery of stock shares is the most secure and expedient delivery process available and provides efficient internal control as well as cost savings. However, you may also transfer certificates directly. When the securities have been officially transferred, you will also receive an official receipt for income tax purposes.

Securities Delivered Electronically

The following information will enable your broker to facilitate an electronic transfer of stock:

Deposit Trust Company

Northern Trust Company

Trust Department

Participant/DTC #2669

RE: YWCA Metropolitan Chicago

Account #: 26-39730

Securities Delivered by Mail

Sign your certificates, obtain a medallion guarantee from your broker, and send all documents via registered mail to:

YWCA Metropolitan Chicago

ATTN: Development

1 North LaSalle, Suite 1150

Chicago, IL 60602

Contact Us

Brian Starr, Director, Inspired Giving

YWCA Metropolitan Chicago

1 N. LaSalle, Ste. 1150

Chicago, IL 60602

312.762.2710

Brian.starr@ywcachicago.org

**Always consult your personal financial or tax advisor in advance to see how a gift of securities can benefit you. The stock must be long-term (owned at least one year and a day).*