



## TRANSFER INSTRUCTIONS FOR GIFTS OF STOCK / MUTUAL FUND

FOR YOUTH DEVELOPMENT®  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY

Thank you for considering a gift of stock to support the **YMCA of Honolulu**. To ensure your gift is processed quickly and accurately, please follow the steps below.

### Step 1: Complete This Form

Donor's Name: \_\_\_\_\_ Date \_\_\_\_\_

Donor's Email: \_\_\_\_\_ Donor's Phone Number: \_\_\_\_\_

Broker Name: \_\_\_\_\_ DTC Number: \_\_\_\_\_

Broker Contact Name: \_\_\_\_\_

Broker's Email: \_\_\_\_\_ Broker's Phone Number: \_\_\_\_\_

Stock/Mutual Fund Name	Number of Shares	CUSIP # (9 digits) if known
1.		
2.		
3.		
Designation or Special Instructions for Use of Gift:		

### Step 2: Send This Form by Email to:

[kbates@ymcahonolulu.org](mailto:kbates@ymcahonolulu.org) or  
[kvanduyne@ymcahonolulu.org](mailto:kvanduyne@ymcahonolulu.org)

### Step 3: Have Your Broker Transfer Your Stock or Mutual Fund to:

J.P. Morgan **DTC #0902** Credit Acct. **#P72500**

YMCA of Honolulu Account **#D09759002**

### For any questions, please contact:

J.P. Morgan  
(866) 437-9331  
[pb.service9331@jpmorgan.com](mailto:pb.service9331@jpmorgan.com)

YMCA of Honolulu  
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**YMCA of Honolulu Tax ID: 99-0073533**