



Stock Donation Information

How to Make Gifts of Securities

With the tax-saving advantages achieved by donating appreciated securities, many friends and supporters of the Boys & Girls Clubs of Santa Cruz County find they can be more generous than they might otherwise be with a gift of cash.

Donations of marketable securities can be as easy as advising your broker or agent to transfer the stock electronically to the Boys & Girls Clubs of Santa Cruz County brokerage account, or delivering your stock certificate assigned to "Boys & Girls Clubs of Santa Cruz County."

If you are making a donation of stock via electronic transfer, please email or call the Club so that we know how to attribute your gift (and thank you accordingly!). You can reach us at lis@boysandgirlsclub.info or 831-423-3138 x 27

Recorded Date of Gift

The date the gift is made is the date that Boys & Girls Clubs of Santa Cruz County receives irrevocable control and ownership of the security. This normally occurs in one of two ways:

- The security is received by the Boys & Girls Clubs of Santa Cruz County broker or agent via electronic transfer;
- OR
- The security is hand delivered, mailed or emailed to a Boys & Girls Clubs of Santa Cruz County representative by the donor or his/her broker or agent along with Stock Power and Guaranteed Signature.

Gifts of stock options, closely held stocks or stocks with any restrictions must be evaluated by the Club to determine if the gift can be accepted. Donors should be advised by their personal accountants and/or financial advisors to calculate their charitable tax deduction and the value of their gift of securities.



How to Make a Donation of Securities/Stock

Electronic Transfer

If you choose to transfer your gift of stock electronically, please provide your stockbroker with the following information:

Boys & Girls Club Depository Trust Company (DTC) #:	0015
Boys & Girls Club Brokerage Firm Name:	Morgan Stanley
Boys & Girls Club Account #:	136-054520-002
Boys & Girls Club Account Name:	The Boys & Girls Clubs of Santa Cruz County

Hand Delivery

Hand deliver the Gift of Stock Transaction Form, Stock Certificate with Stock Power and Guaranteed Signature to:

Lis DuBois, Executive Director
Boys & Girls Clubs of Santa Cruz County
543 Center Street
Santa Cruz, CA 95060
Email: lis@boysandgirlsclub.info

Mail

If sending by mail, please send the Stock Certificate and a Stock Power and Guaranteed Signature separately. Include a cover letter noting that the donor wishes to gift the stock to the Boys & Girls Clubs of Santa Cruz County and request that the Boys & Girls Clubs of Santa Cruz County broker sell on good delivery. If the stock is in multiple names, all individuals must sign the stock certificate and letter to the Club's broker. Send the letter and stock to:

John Howard
Financial Advisor Team
Morgan Stanley
6004 La Madrona Dr.
Santa Cruz, CA 95060-1040

Email

Email the following information to Lis DuBois lis@boysandgirlsclub.info. Please indicate "Stock Transfer" in the email subject line.

Donor Name
Date of Transaction
Your Stockbroker's Name and Phone #
Name of Stock and Number of Shares
Approximate Gift Value



Gift of Stock Transaction Form

Thank you for making a gift of stock to the Boys & Girls Clubs of Santa Cruz County. Please complete the form below and refer to the instructions on the following page to send your gift of stock.

Donor Name	
Date of Stock Transaction	
Your Stockbroker's Name	
Your Stockbroker's Phone #	
Name of Stock	
Number of Shares	
Approximate Gift Value	\$

For assistance in all stock transfers, contact Lis DuBois (831) 423-313 Ext. 27.