



**BOYS & GIRLS CLUBS  
OF WELD COUNTY**

## **Instructions for Giving Securities**

**BY PHONE:** If your broker or bank holds your securities,

1. Instruct your broker to transfer the securities, DTC formatted, as follows:

DTC: 0221

Brokerage: UBS Financial Services (1901 56<sup>th</sup> Ave. Suite 300, Greeley CO 80634)

Reference Acct. # GL-03425-16, Boys & Girls Clubs of Weld County

or, if your broker cannot transfer the shares in the above manner, instruct your broker to establish a temporary account in the name of Boys & Girls Clubs of Weld County and transfer the shares of stock you plan to give to that account.

2. Ask your broker to telephone the Boys & Girls Club Development Office at (970)573-7797 on the same day for our Federal I.D.# and instructions.

3. Write a brief note identifying yourself (name, address, and phone number) and describing the number of shares, the name(s) of the stock(s), your broker's name and phone number, and the purpose to which you direct your gift (outright gift, annuity, trust, etc.). Mail your note on the same day to:

Boys & Girls Clubs of Weld County  
P.O Box 812  
Greeley, CO 80632

**BY MAIL:** If you hold your stock certificates,

1. Send your unendorsed stock certificate(s) by registered mail to the above address.
2. In a separate envelope, by regular mail, send to the same address.
  - a. A signed Stock Power form\* (one power for each certificate; complete the signature block exactly as the stock is registered, and have the signature "medallion guaranteed" by a broker or an officer of a national bank).
  - b. A brief note identifying yourself (name, address, and phone number) and describing the number of shares, the name(s) of the stock(s), and the purpose to which you direct your gift (outright gift, annuity, trust, etc.).
3. Mail both envelopes on the same day. The "date of gift" is determined by the postmarks.

Substantiation of gifts of securities may require keeping a written record of certain information and filing of Form 8283 with your Federal tax return.

\* *Stock power forms are available from your broker or bank.*