



**GIFTS OF STOCK AND SECURITIES**

Thank you for your interest in making a gift of stock or securities to YAI/National Institute for People with Disabilities.

Once you have decided on the stock or mutual fund shares you will transfer to YAI, please complete and return this form (by fax or mail) so that we can track your gift and acknowledge it properly. The instructions below should be provided to your broker for the electronic transfer of stocks and mutual fund shares. Please allow for sufficient processing time by your broker. Particularly at year-end, two to three weeks may be required. (Note: Your gift will be credited as the mean value of the security on the date it is transferred to YAI.)

***Please give the following information to your broker:***

YAI's Trading Account Manager: UBS Financial Services Inc.  
UBS Contact: Enrico Lomonaco (212-333-8951)  
DTC Number: 221  
Account Number: UT 74529  
Account Name: YAI Operating Account

***Please complete the following form for YAI:***

Donor Information

Donor Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Gift Information

Stock/Fund Name: \_\_\_\_\_  
Number of shares OR dollar amount: \_\_\_\_\_  
Brokerage Firm: \_\_\_\_\_  
Broker's Name: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

**Fax or mail this completed form to:**

Lauren Marzo  
YAI, 460 W. 34<sup>th</sup> St., New York, NY 10001  
Fax: (212) 868-2132  
Phone: 212-273-6121, Email: Lmarzo@yai.org