



**BOYS & GIRLS CLUB
OF LAGUNA BEACH**

Also serving Saddleback Valley

GIFT OF SECURITIES FORM

Donor name: _____

Security Name: _____ Ticker Symbol: _____

Number of Shares: _____ and/or estimated value*: _____

Is this security publicly traded? Yes No

When would you like to make this transfer: ____/____/____

Is this a recurring gift? Yes No

If yes, then indicate the frequency you wish to give:

monthly quarterly semi-annual annual

Are you working with an investment firm? Yes No *If yes, complete info below.*

Firm: _____ Advisor: _____

Advisor Phone: _____ Advisor email: _____

You may choose to give to the Investment or Endowment or both (% to add up to 100%).

Investment Account: _____ % OR \$ _____ . _____

Endowment Account: _____ % OR \$ _____ . _____

How would you like to be recognized?

Same as Above Anonymous

By this name: _____ In honor/ memory of: _____

Signature: _____ Today's date: ____/____/____

** Final value for publicly traded securities will be based on the average of the intra-day high and low on the date of transfer.*

Please send this form to the Club in attention to Chris Switzer, CFO and/or email christophers@bgclaguna.org. All non-cash gifts of securities must be reviewed by the Club's Finance Committee prior to their official acceptance per our gift acceptance policy and in confidentiality. This review will typically be completed within 24-72 hours of receipt of this form for publicly traded assets unless questions or concerns arise. After review, CFO completes the securities gift confirmation and sends it back to you and/or your financial advisor.

SECURITIES GIFT CONFIRMATION *(to be completed by Club CEO)*

Charles Schwab DTC # 0164, Code 40

Receiving Account Name: Boys & Girls Club of Laguna Beach

Endowment Account #: 4647-7919 Investment Account #: 7496-8852

Federal Tax ID #: 95-1878822

CFO Name: Christopher Switzer

CFO Signature: _____ Today's date: ____/____/_____

Thank you for your generous donation! You are supporting kids that need us most with your donation. It is because of donors like you that we are able to live our mission each day: to inspire and enable all young people, especially those who need us most, to realize their full potential as productive, responsible and caring members of society. Your gift is an investment in a great future for Club youth, because Great Futures Start Here at our Club.