



## GIFTS OF STOCK, MUTUAL FUNDS or BONDS

A gift of stock, mutual funds or bonds is an attractive way to make a donation to Yolo Land Trust. By giving appreciated property (such as stocks, mutual funds or bonds) you can avoid paying capital gains taxes on the appreciation, receive a tax deduction on the full value of the gift, and support the Yolo Land Trust at a lower cost to you.

### How to Transfer Stock, Mutual Funds or Bonds to the Yolo Land Trust:

To make a gift, please notify your broker in writing that you are making a charitable gift to the Yolo Land Trust. We ask that you or your broker contact our Executive Director, Michele Clark, to notify Yolo Land Trust of the transfer. This is important because your name will not be included in the transfer to our broker.

Michele Clark  
Yolo Land Trust  
221 West Court, Suite 5, Woodland, CA 95695  
P.O. Box 1196, Woodland, CA 95776  
[mclark@theyololandtrust.org](mailto:mclark@theyololandtrust.org)  
530-662-1110  
The Yolo Land Trust's EIN number is: 68-0160105

### Transfer instructions for your broker:

**If the securities are held in "Street Name" at a brokerage firm or bank other than Fidelity Investments, have your broker transfer the shares to:**

Fidelity Investments  
DTC# 0226  
Account #638245598  
Yolo Land Trust

**If the securities are held at Fidelity Investments, have your advisor journal the gift to YLT's account at Fidelity Investments:**

Account #638245598  
Yolo Land Trust

**For other circumstances, contact YLT's Advisor:**

Mike Genovese, CFP  
Genovese, Burford & Brothers  
[mike@gbbwealth.com](mailto:mike@gbbwealth.com)  
916-269-0671

**Thank you for your support of the Yolo Land Trust!**

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