



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 Yolo Land Trust.

We ask that you or your broker contact our Executive Director, John Currey, to notify us of the transfer. *This is important because your name will not be included in the transfer to our broker.*

John Currey
Yolo Land Trust
Office: 221 West Court, Suite 5, Woodland, CA 95695
Mail: P.O. Box 1196, Woodland, CA 95776
jcurrey@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
916-269-0671

Thank you for your support!

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