# How to Send Gifts of Stock, IRA Funds, or Donor Advised Funds to Island Senior Resources

> *Island Senior Resources is also called **Senior Services of Island County** for accounting purposes.*

## Contact Assistance:


### Don Hall

*Director of Annual Giving*

(360) 544-7788
don@senior-resources.org


**Thank you for considering a gift to Island Senior Resources. Your generosity helps support thousands of older adults and caregivers today – and for decades to come.**

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### Step 1 – Decide How You Would Like to Give

You may support Island Senior Resources in several ways:

- Transfer **stocks or securities** from an investment account
- Make a **Qualified Charitable Distribution** (QCD) from your IRA
- Recommend a grant from a **Donor Advised Fund** (DAF)
- Include Island Senior Resources in your **will, trust, or estate plan**
- Create a **legacy or planned gift**

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### Step 2 — Work With Your Financial Advisor

To include Island Senior Resources in your estate or financial plan:

1. Discuss your charitable goals with your **financial advisor, attorney, or estate planner.**
2. Provide them with the organization information below.
3. Contact us if your advisor would like to speak with our office directly.

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### Step 3 — Send a Gift from a Donor Advised Fund (DAF)

If you have a **Donor Advised Fund**, you may recommend a grant to Island Senior Resources through your fund manager (such as Fidelity Charitable, Schwab Charitable, Vanguard Charitable, or a community foundation).

**Provide the following information when recommending your grant:**

**Legal Organization Name:** Senior Services of Island County

Federal **Tax ID:** 52-1049443

**You may designate your grant to:**

- The Annual Giving Campaign
- A specific program
- Or the area of greatest need

If possible, please ask your fund manager to include your **name and contact information** so we can properly acknowledge your gift.

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### Step 4 — Transfer Stock from a Raymond James Account

If your investment account is **with Raymond James**, your branch can process an "Authority to Transfer Internal" request.

**Provide your advisor with this information:**

**Organization Name:** Senior Services of Island County (legal account name for Island Senior Resources)

**Federal Tax ID:** 52-1049443

Your Raymond James advisor can complete the transfer internally.

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### Step 5 — Transfer Stock from Another Brokerage

If your account is **not with Raymond James**, ask your financial institution to transfer shares using the following information:

**Receiving Firm:** Raymond James

**DTC Number:** 0725

**Attention:** Tyrel Lacey, 360-341-1415

**Account Name:** Senior Services of Island County (non-profit corporate account)

**Account Number:** 752YR375

Your financial institution may require you to sign a **letter of authorization** to complete the transfer.

Please notify us when the transfer has been requested so we can confirm when the gift arrives safely.

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### Step 6 — Confirm Your Gift

Once your transfer or grant recommendation has been submitted:

1. Notify Island Senior Resources that the transfer or grant has been initiated.
2. We will confirm when the gift is received.
3. You will receive a **written acknowledgment for your tax records.**

## Thank You for helping Island Senior Resources care for our Island Community Today – and for generations to come.

Island Senior Resources • PO Box 939 | Freeland, WA 98249 • (360) 544-7788