

## 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 account purposes.)*

### Contact for 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:**

Tyrell Lacy

425-274-2430

**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.**

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**Thank you for helping Island Senior Resources care for our island community today—and for generations to come.**