

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

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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.

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.

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.

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.

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.**