



# DONATION INFORMATION & INSTRUCTIONS

UPDATED AS OF JUNE 2019

## GENERAL INFORMATION

Thank you for considering a donation to Win in the form of an electronic transfer, a bequest, or a stock or mutual fund gift. Your support will help us to continue to break the cycle of homelessness for women and their children well into the future.

Please review the information contained in this overview document for instructions on how to complete these gifts.

**If you have any questions, please feel free to contact us at any time:**

**Jeffry Pennock**, Associate Vice President, Major Gifts

TEL: 212.560.0239 EMAIL: [jpennock@winnyc.org](mailto:jpennock@winnyc.org)

## NOTIFICATION OF INTENT FORM

Regardless of your gift method, please fill out the following form and forward it to Win so that we can ensure correct and timely acknowledgement of your gift.

DATE:

NAME:

ADDRESS:

PHONE NUMBER:

EMAIL ADDRESS:

**DETAILS OF GIFT** (electronic transfer amount/date, bequest information, stock symbols, number of shares, name of stock or mutual fund, etc.):

**Send this form to Win:**

ATTN: Jeffry Pennock | VIA EMAIL: [jpennock@winnyc.org](mailto:jpennock@winnyc.org) | VIA FAX: 212.736.1649



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## INSTRUCTIONS FOR MAKING AN ELECTRONIC TRANSFER/GIFT TO WIN

To make an electronic transfer of funds directly to Win, please fill out and send the Notification of Intent Form on the previous page and provide the following information to your bank:

**ORGANIZATION NAME:** Women In Need, Inc. (Win)  
**ADDRESS:** One State Street Plaza, 18th Floor, New York, NY 10004  
**BANK NAME:** Bank of America  
**ACCOUNT NUMBER:** #483043524432

**For an Automated Clearing House (ACH) Payment:**

**ACH ROUTING NUMBER:** #021000322

**For a Wire Transfer:**

**WIRE TRANSFER ROUTING NUMBER:** #026009593

## INSTRUCTIONS FOR MAKING A BEQUEST GIFT

Win can be named as full or partial beneficiary in a will, life insurance policy, retirement plan, annuity, or trust fund.

If you or a loved one would like to leave a gift to Win in your will or other financial instrument, please fill out and send the Notification of Intent Form on the previous page, and ensure that Win is listed correctly in your documentation:

**ORGANIZATION NAME:** Women In Need, Inc. (Win)  
**ADDRESS:** One State Street Plaza, 18th Floor, New York, NY 10004  
**TAX ID NUMBER:** 13-3164477

## INSTRUCTIONS FOR MAKING A STOCK OR MUTUAL FUND GIFT

A stock or mutual fund gift can reduce or eliminate capital gains tax and result in a charitable deduction for the full, appreciated value.

Win prefers that gifts of stocks or mutual funds be transferred electronically into our account at Merrill Lynch/Bank of America, rather than sending the stock certificates to Win or selling the stock and sending the proceeds to Win.

If you plan to make a gift of stocks/mutual funds, please fill out and send the Notification of Intent Form on the previous page, and instruct your broker to transfer stocks/mutual funds as follows:

**DTC NUMBER:** #8862  
**MERRILL LYNCH ACCOUNT NUMBER:** #862-02757  
**ACCOUNT NAME:** Women In Need, Inc. (Win)  
**CONTACT:** Mynoon Doro  
**EMAIL:** mynoon\_doro@ml.com  
**TEL:** (800) 333-9701  
**TAX ID NUMBER:** 13-3164477