



## HOW TO DONATE STOCK

DONATING STOCK IS A SIMPLE PROCESS THAT TAKES ONLY A FEW MINUTES

**STEP 1:** Authorize your broker or financial consultant to transfer the stock as a contribution to United Way. Please use the sample letter provided below as a guide.

**STEP 2:** For your tax deduction and our acknowledgement purposes, United Way **MUST** receive the information about your donation. Please complete the front and back of this form and mail to:

Stock Transfer Agent  
c/o United Way  
120 Wall Street, 4th Floor  
New York, NY 10005

For assistance or more information, please contact United Way at 212.701.2606 or email [stock@uwts.unitedway.org](mailto:stock@uwts.unitedway.org).

## SAMPLE LETTER TO YOUR BROKER

Dear Broker,

I would like to make a charitable donation to United Way. Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ on or about \_\_\_\_/\_\_\_\_/\_\_\_\_.

The stock is currently trading close to \$\_\_\_\_\_ per share.

I would prefer to have the stock delivered to United Way's account by DTC transfer, using this information:

Broker: Merrill Lynch  
Account Name: United Way of America Tri-State Community Impact Fund  
Account #: 857-04N06  
DTC#: 5198  
Federal Tax ID#: 13-1635294

For assistance or more information, please contact United Way at 212.701.2606 or email [stock@uwts.unitedway.org](mailto:stock@uwts.unitedway.org).

Sincerely,

*Your Name*

## STOCK CONTRIBUTION FORM

Stock Name or Symbol \_\_\_\_\_

Number of Shares \_\_\_\_\_

Value per share \_\_\_\_\_

Total estimated donation\* \_\_\_\_\_

Expected date of transfer \_\_\_\_\_

\* The receipted value of your contribution will be based on the average of the high and low market price on the date the securities are transferred.