



United Way
of San Diego County

GIFT OF STOCK NOTIFICATION FORM

Please complete the information below to notify United Way of San Diego County (UWSD) of your gift and ensure that it is processed accurately.

DONOR INFORMATION:

Name

Address

City

State

Zip

Email

Phone

I do not wish to be recognized in printed materials

SECURITIES AND BROKER INFORMATION

Name & Type of Securities (e.g.: DELL common Stock)

Security Symbol

Number of Shares/Estimated Value

Transfer Date

Broker Name / Contact Person

Company or Firm

Phone/Email Contact

Please return completed form via
email to lisa.kalal@uwsd.org, or fax to
858.492.2015, or mail to:

United Way of San Diego County
4699 Murphy Canyon Road
San Diego, CA 92123



Gifts of \$10,000 or more will be recognized
with membership in the prestigious
Alexis de Tocqueville Society.



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SIMPLE STEPS FOR GIVING A GIFT OF SECURITIES TO UNITED WAY

Thank you for your interest in making a charitable gift to United Way of San Diego County (UWSD) in the form of a Stock Transfer. It is a simple, straightforward process with potential tax benefits.

Your broker can transfer the securities directly to UWSD's account. It is important that the securities be transferred to United Way's account **prior to being sold** in order to **avoid capital gains taxation**.

To make a gift of stock: Call or write to your broker to initiate a transfer. Instruct your broker to donate the stock directly to UWSD using the information in the box to the right.

You may be eligible to increase the power of your donation with employer matching funds. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree. No goods or services will be received for this donation.

Brokerage House: Wells Fargo Advisors, LLC

Telephone Number: 858-523-7904

Account Name: United Way of San Diego County

Account Number: 6242-5386

DTC Number: 0141

Brokerage House: Edward Jones

Telephone Number: 619-296-3400

Account Name: United Way of San Diego County

Account Number: 9112-3601

DTC Number: 0057

Reference: Donor Name (Ask your broker to include your name in the transaction description to ensure proper gift acknowledgement)

Note: For *mutual fund gifts*, or for *gifts of stock not held in a brokerage account*, please contact the Wells Fargo or Edward Jones team listed above.

Please return this completed form to UWSD so that we can process and acknowledge your gift.

Contact Lisa Kalal, Vice President, Philanthropy, with questions at lisa.kalal@uwsd.org or 858-636-4162.

Thank you for supporting United Way of San Diego County!