

Stock Transfer Contribution and Authorization Form

Thank you for your interest in contributing securities to United Way Bay Area. Most publicly traded securities with unrealized long-term gains (meaning they were purchased more than a year ago and have increased in value) may be donated to a public charity, without the need to sell them first. When the donation is made, the donor can claim the fair market value as an itemized deduction on their federal tax return—up to 30% of the donor’s adjusted gross income (AGI). Other types of securities, such as restricted or privately traded securities and donations to nonpublic charities, may also be deductible, but additional requirements and limitations may apply. Please consult your tax advisor before making a gift of appreciated securities.

Use this form to deliver transfer instructions to your broker. When you are ready to transfer your gift, please print clearly and complete all of the following information, submitting the original, signed document to your broker and sending a copy back to the United Way Stock Coordinator at customerservice@uwba.org.

1. Donor Information

To expedite the handling of your gift, please print clearly.

Name:
Home Address:
City, State, Zip:
Company Name:
Daytime Phone:
Email Address:

2. Designated Estimations (optional)

Across the Bay Area, 1 in 4 families are living in poverty. At United Way Bay Area, we are committed to cutting that number in half by 2020. We understand the complex challenges faced by people living in poverty require innovative yet simple solutions. That’s why our programs connect families to better education, higher-paying jobs, and basic needs like food and health care, often under a single roof.

If you wish to designate your entire stock transfer to United Way, please skip to step three. If you’d like to donate a portion of your donation to other agencies or nonprofits, please provide the information below.

% Total Gift* _____

Agency Name _____

Address _____

City _____ State _____ Zip _____

% Total Gift* _____

Agency Name _____

Address _____

City _____ State _____ Zip _____

(Please attach additional pages as needed.)

Note: gift may be adjusted based on net proceeds.

*For tax receipt purposes, actual stock valuation is based on the mean of the highest and lowest price on the day the stock is received by United Way. Gifts of stock will be liquidated when received, and brokerage fees will be deducted from the gross proceeds and your campaign gift will be credited with the net value after brokerage fees.

3. Securities to Transfer

Security Name:	
Number of Shares:	
Estimated Value:*	
Security Name:	
Number of Shares:	
Estimated Value:*	
Security Name:	
Number of Shares:	
Estimated Value:*	

4. Transfer Authorization

I/we, _____, hereby
authorize on this _____ day of _____ 20_____,
my/our broker at _____
to transfer from my account number _____

to the United Way Bay Area account at Merrill Lynch, account number:
27G-02330 , DTC#8862.

Sign Here (signature required)

Signature: _____ Date: _____

Questions or comments?

Please contact:
Stock Coordinator,
United Way Bay Area
550 Kearny Street, Suite 1000
San Francisco, California 94108
Phone: 415.808.4479
Fax: 415.544.9856