



ELECTRONIC TRANSFER OF SECURITIES

Donating stock, bonds or mutual funds is a great way to support our Bay Area neighbors. Thank you for making a gift of securities to United Way Bay Area.

Information Required by Your Broker / DTC Instructions

UWBA Broker: Merrill Lynch
1900 Duke Street
Alexandria, VA

Account Name: United Way Bay Area
DTC Number: 8862
Account Number: 705-02293

Account Representative: Patrick S. Burke
Email: patrick_burke@ml.com
Phone: 703-838-6864

To ensure we provide you with the necessary documentation for income tax purposes, please email the following information or completed form to **Eli Nevel-Tyler at donorservices@uwba.org**.

Donor Information

Name:

Address, City, State, Zip:

Daytime Phone:

Cell Phone:

Email:

Donation Details

Security Name:

Number of Shares:

Brokerage Name:

Expected Date of Transfer:

[Please attach additional pages as needed]