



GIFT OF STOCK TO UNITED WAY

STOCK CONTRIBUTION TRANSFER INSTRUCTIONS

Thank you for selecting United Way as the recipient of your charitable donation. Some of the potential benefits of donating appreciated securities include:

- Avoid paying capital gains tax
- Receive a charitable income tax deduction
- Enjoy possible increased income
- Further our mission

Donating stock is a simple process that takes only a few minutes. In just two easy steps you can invest in United Way to help advance the common good in our communities:

STEP 1

Authorize your broker or financial consultant to transfer the stock as a contribution to United Way.

Account Name: United Way of Northern New Jersey

Brokerage Firm: Edward Jones

Contact Name: Andrew Boles

Phone: 973.377.2377

Account#: 313-14025-1-7

Federal Tax ID#: 22-1487247

DTC#: 0057

STEP 2

Please be sure to inform United Way of the transfer. Contact:

Bonnie O'Neill | P.O. Box 1948, Morristown NJ 07962 | 973.993.1160, x.106 | Bonnie.ONeill@UnitedWayNNJ.org

Please be prepared to advise us of the following:

- Name of donor
- Name of security
- Number of shares intended
- Proposed date of transfer

After the stock is received, we will send you an acknowledgment letter as confirmation of your gift. The letter can also be used for tax purposes.

GIVE. ADVOCATE. VOLUNTEER.

United Way
of Northern New Jersey

UnitedWayNNJ.org

LIVE UNITED

