

United
Way



A Guide To Donating Stock



How to Donate Stock

Donating stock is a simple process, taking just minutes. In just a few easy steps, you can invest in what matters.

Step 1:

Authorize your broker or financial consultant to transfer the stock as a contribution to United Way (see sample letter on flap). Include the following details:

- stock name or symbol
- number of shares
- expected transfer date
- name of your employer
- your mailing address
- work & home phone
- your email address

Transfer Information:

UWBC Broker:	Wachovia Securities
Account:	United Way of Bucks County
Account Number:	2174-0475 NTL2
DTC Number:	0141

United Way of Bucks County Federal Tax ID# 23-1409706

Step 2:

For your tax deduction and our acknowledgement purposes, United Way **MUST** receive the above information.

Please email information to sharonb@uwbucks.org or fax to 215-949-0373.

Step 3:

Finally, if you are giving in conjunction with your workplace campaign, please tell your Campaign Chair, so your gift will be included in the company results.

Sample Letter to Your Broker

Your Letterhead

123 Main St, Anytown, PA, 12345

Date

Dear Broker,

I would like to make a charitable donation to United Way of Bucks County as part of the campaign at (your company).

Please transfer _____ shares of _____ (full stock name and symbol if known) on or about ____/____/____. The stock is currently trading close to \$_____ per share. Please have the stock delivered to United Way of Bucks County by DTC Transfer, using this information:

UWBC Broker:	Wachovia Securities, LLC c/o First Clearing, LLC
Account:	United Way of Bucks County
Account Number:	2174-0475 NTL2
DTC Number:	0141

For assistance or more information, please contact United Way of Bucks County at 215-949-1660 ext 116.

Sincerely,
Your Name
Your Address
Your Phone
Your Email



cc: United Way of Bucks County
c/o stock

United Way
of Bucks County

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Please return with your leadership giving recognition card.

Stock Name/Symbol: _____

Number of shares: _____

Value per share: _____

Total estimated donation: _____

Expected date of transfer: _____

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

Name: _____

Company: _____

Address: _____

Work Phone: _____

Home Phone: _____

Email: _____

Thank you for investing in what matters™.



Invest in what matters

Donating gifts of appreciated securities is a smart business decision. In addition to significant tax savings, you are making a sound investment in your community. You are helping United Way of Bucks County get at the underlying root causes of problems that matter most to the people of Bucks County.

Mission Statement

The Mission of United Way of Bucks County is to improve lives by mobilizing the caring power of communities.

www.uwbucks.org

Learn More

This is an example of the potential financial benefits of giving long-term appreciated stock.

Potential Stock Gift Benefits

	Option A give securities (basis of \$2,000)	Option B cash/check	Option C sell securities and give cash
Gift Value	\$10,000	\$10,000	\$10,000
Income			
Tax Savings assuming 35% tax rate	(\$3,500)	(\$3,500)	(\$3,500)
Capital Gains Tax	(\$1,200)	n/a	\$1,200
Net cost to donor	\$5,300	\$6,500	\$7,700

Learn More

Visit www.uwbucks.org for the latest information on how United Way of Bucks County makes a difference in your community.

United Way
of Bucks County
413 Hood Blvd
Fairless Hills, PA 19030

215-949-1660 ext 116



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