

United Way of Central Jersey
STOCK DONATION FORM



How to Donate Stock:

1. Authorize your broker or financial advisor to transfer the stock as a contribution to United Way of Central Jersey.
2. Use the sample letter below as a guide.
3. In order to properly provide you with a tax receipt and acknowledgement letter, United Way must receive the information noted below about you as the donor.
4. **Please print out this form, complete the bottom portion and mail it, along with a copy of your letter to your broker, to United Way.**

Sample Letter to Your Broker

Dear (Your Broker Name):

I would like to make a charitable donation to United Way of Central Jersey. Please transfer (#) of shares of (Stock Name) on or about (MM/DD/YYYY). The stock is currently trading close to \$(Amount) per share. I would prefer to have the stock delivered to United Way's account by wire transfer. Please contact United Way's noted broker below for wire transfer instructions:

Broker: **Morgan Stanley Wealth Management, 20 Linden Place**
Red Bank, NJ 07701

Account Name: **United Way of Central Jersey**

Federal Tax ID #: **22-1520408**

Please contact Elizabeth Hance, Chief Financial Officer at the United Way office, 732-247-3727, email ehance@uwcj.org if you have any questions or require additional information.

Sincerely,
(Your Name)

cc: United Way, 32 Ford Avenue, Milltown, NJ, 08879, att: E. Hance

Stock Donation Information

Donor Name _____

Address _____

Primary Phone _____

Email _____

Stock Name or Symbol _____

Number of Shares _____

Value per Share _____

Total Estimated Donation _____

Expected Date of Transfer _____

Please note: the receipted value of your contribution will be based on the average of the high and low market price on the date that the securities are transferred.

If you have any questions about this form, please contact Elizabeth Hance at the United Way of Central Jersey, 732-247-3727, email ehance@uwcj.org.