

STOCK TRANSFER

NOTE: Your broker must include your name on the transfer in order for United Way Greater Triangle to identify and acknowledge your gift.

Four easy check points to speed your gift of securities.

- ☐ Fill out this form completely
- ☐ Mail or fax a copy to your broker
- ☐ Email a second copy to the United Way: pledges@unitedwaytriangle.org
- ☐ Retain the original for your files

Broker's Name and Brokerage House _____

Address _____

Telephone _____ Date _____

Dear Broker,

Please accept this authorization to transfer _____ shares of _____ stock from my account with your firm, to the account of United Way of the Greater Triangle, #WA8076038 with Truist Investment Services via DTC Clearing #0226.

Thank you for your assistance in this matter.

Sincerely,

Print Donor Name _____ Signature of Donor _____

Please direct questions to:

Kelsey Camarena, Chief Philanthropy Officer
kcamarena@unitedwaytriangle.org