



MAKING A CHARITABLE GIFT OF STOCK

Donating appreciated securities is a simple and effective way to support United Way St. Croix and Red Cedar Valleys (UW Valleys). Gifts of publicly traded stock often provide tax advantages, including a charitable tax deduction for the fair market value of shares and the ability to avoid capital gains tax that would occur if the shares were sold by the donor.

To ensure your gift is processed accurately and in a timely manner, please follow the steps below.

STEPS FOR DONORS

1. Instruct the broker regarding the effective date of the gift.
2. Identify the name of the stock and the numbers of shares being donated.
3. Provide the name of the stock and the number of shares being donated.
4. Contact our receiving broker to transfer the stock into UW Valley's brokerage account.
5. Call or email UW Valleys contact person listed below to notify us that the transfer has been initiated.

Name of Receiving Institution:	Pershing LLC
Broker Contact:	Michael Nelson, Leverty Financial Group
Telephone No.	(715) 377-2081
Receiving Account No.	BBN753250
DTC No.	0443
Account Name:	United Way St. Croix and Red Cedar Valleys Inc
United Way's Tax ID:	39-1372545
UW Valleys Contact:	Drew Rosales, Administrative Manager (715) 377-0203 or givehope@uwvalleys.org

To maintain a clear record of your gift, please send UW Valleys a copy of any letter of instruction you provide to your broker. Please ensure the gift is clearly identified. If no gift date is provided, the date the stock is received by the Broker will be used.

UW Valleys will send an acknowledgement letter to the donor after the stock is sold. The stock will be valued at the median market value on the recorded gift date.

Thank you for your generous support.