

STOCK DONATIONS

INSTRUCTIONS



Donating stock can be an effective method of supporting United Way. Stock donations may enable you to increase your gift to United Way while realizing additional tax benefits. Check with your broker or advisor to determine if a stock donation is right for you.

ELECTRONIC TRANSFER

Authorize your broker to electronically transfer stock as a contribution to United Way of Greater St. Louis. Here's the information you will need:

WELLS FARGO ADVISORS

DTC #: 0141
Account #: 6615-0314
Contact: Chris Kuhn
Phone: 314-991-7847

EDWARD JONES

DTC #: 00057
Account #: 100-09948-1-2
Contact: Bob Zerega
Phone: 314-515-3129

Some brokers do not provide donor information to United Way's broker. In order for us to acknowledge your gift, please send the information below to the team member listed at the end of this page.

- Your name
- Contact number
- Number of shares of the stock being donated
- Mailing address
- Name of Stock
- Estimated date of transfer to United Way

SECURITIES CERTIFICATES

If you want to donate stock certificates that you have in your possession, please contact the team member below. For security purposes, it is important that you do not endorse the stock certificate itself before sending to United Way. Additional instructions will be provided upon outreach.

If you have questions about the stock transfer process or encounter issues, please contact:

Marquita Washington

marquita.washington@stl.unitedway.org

(314) 539-4267

If you'd like information about additional Tax Smart giving options, please reach out to:

Meghan Freeman

meghan.freeman@stl.unitedway.org

Work: (314) 539-4035

CEO & SLT EVENT BRIEFING DOC

PHILANTHROPY TEAM EVENTS
