

Giving Gifts of Stocks and Securities to United Way Of Greater Philadelphia And Southern New Jersey

There are two ways to donate securities to the United Way of Greater Philadelphia and Southern New Jersey.

1. Gifts of securities to United Way of Greater Philadelphia and Southern New Jersey may be made through your broker, which is the easiest method of donation. Your broker should do the following:

- Notify United Way of Greater Philadelphia and Southern New Jersey at 800-417-8742 or stockgifts@uwgpsnj.org of the gift.
- Initiate a DTC Transfer using the following information:

Credit to Vanguard Brokerage Services

Sub Account, United Way of Greater Philadelphia and Southern New Jersey

Account # 60253979

DTC# 0062

The donor's name must appear in the trailer information of the DTC transfer.

2. If you do not wish to use a broker, you can transfer the securities directly to United Way of Greater Philadelphia and Southern New Jersey:

- The securities must be endorsed by the registered owner. The registered owner must consult his or her broker or bank to obtain a "medallion signature guarantee" for the back of the certificate. *A notary public cannot provide a medallion signature guarantee.*
 - The registered owner should insert "United Way of Greater Philadelphia and Southern New Jersey (EIN 23-1556045)" as the transferee party on the back of the certificate.
 - The registered owner should insert "Vanguard Brokerage Services" as the attorney-in-fact on the back of the certificate.
 - Once the back of the certificate is completed with a medallion signature guarantee, it can be sent to United Way of Greater Philadelphia and Southern New Jersey at the address below.
- **The date of the gift is the day the securities pass to United Way of Greater Philadelphia and Southern New Jersey's control.**
- **United Way of Greater Philadelphia and Southern New Jersey cannot accept donations of "controlled" or "restricted" securities, as these terms are defined by the Securities Act of 1933. Please consult your attorney if you have any questions or are interested in donating such securities.**
- **United Way of Greater Philadelphia and Southern New Jersey cannot accept gifts of partial shares of stock, nor can United Way of Greater Philadelphia and Southern New Jersey refund shares of stock to donors.**
- **For income tax purposes, the deductible value is the mean between the high and low quoted selling price on the date of the gift.**
- **Unless otherwise requested, any excess funds valued above the original pledge commitment will be directed to UWGPSNJ's Impact Fund. In the case of payments creating a balance of more than \$100, you will receive a statement for the remaining pledge amount.**

United Way of Greater Philadelphia and Southern New Jersey

P.O. Box 15760

Philadelphia, PA 19103

Stock Donation Line

Call 800-417-8742 or email stockgifts@uwgpsnj.org

Vanguard Brokerage Services is a division of Vanguard Marketing Corporation.

www.UnitedForImpact.org/Stocks

In order to recover expenses incurred to raise, collect and allocate contributions, United Way of Greater Philadelphia and Southern New Jersey charges a cost recovery fee of 12.5% on each donated gift.



United Way
of Greater Philadelphia
and Southern New Jersey