



**United Way  
Centraide**  
Windsor-Essex County

## Share Transfer Form Gifts of Publicly Traded Securities

Contact the V.P., Finance & Operations at (519) 259-6159 to initiate a donation of securities.

United Way will provide you with the appropriate information to ensure your transaction is handled smoothly and efficiently. Please **do not** transfer shares to United Way's brokerage account before speaking with the V. P., Finance & Operations. United Way/Centraide Windsor-Essex County reserves the right to decline donations of securities in accordance with its policies, which are available on request.

**In order to complete a donation:**

1. Fax this completed form to: (519) 259-6159 or email to [abothamley@weareunited.com](mailto:abothamley@weareunited.com)
2. The V. P., Finance & Operations **will then call you to confirm acceptance** and then will provide the appropriate brokerage account details for you.
3. Instruct your broker to initiate the trade and transfer shares to United Way's brokerage account.

**To be completed by Donor (please PRINT):**

Name of Donor: \_\_\_\_\_ Daytime Telephone: \_\_\_\_\_

Donor's Home Address: \_\_\_\_\_

Donor's Workplace (if applicable): \_\_\_\_\_

Donor's Broker Contact Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Brokerage Firm: \_\_\_\_\_

Name of Security: \_\_\_\_\_ # of Securities to be Transferred: \_\_\_\_\_

Approx. Value of each Security: \$ \_\_\_\_\_ Approx. Total Amount of Donation: \$ \_\_\_\_\_

Intended date of Transfer to United Way's Account: \_\_\_\_\_

I understand that once accepted and transferred, I will receive a tax receipt from United Way/Centraide Windsor-Essex County **valued based on the closing price on the date that the securities are received in United Way's account**. These securities are to be donated to United Way/Centraide Windsor-Essex County without restriction\*.

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

*\* sale will be made at the earliest opportunity, in accordance with United Way's policies*