



**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) 258-2346 or email to 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*