



United Way
of Greater Charlotte

SECURITIES DONATION INFORMATION SHEET

Thank you for your interest in contributing securities to United Way of Greater Charlotte. After you have completed this form, provide a copy to your broker in order to initiate this transfer to one of United Way's brokerage accounts listed below. Please provide a copy of this form to United Way to complete the transaction.

PLEASE MAIL A COPY TO:

United Way of Greater Charlotte, Inc.
Attention: Donor Services
601 East 5th Street Suite 350 Charlotte, NC 28202
Additional Options
Fax: 704.371.7191
Email: donorservices@unitedwaygreaterclt.org

It is **very important** that the information below is filled out so that when payment is received, we can sell your securities and acknowledge your gift in a timely fashion. For more information, please contact our Finance Department at 704.371.6218.

NAME

EMPLOYER

PHONE NUMBER

DONOR'S BROKERAGE FIRM

UW BROKERAGE ACCOUNT

SECURITIES NAME

OF SHARES

PROJECTED TRANSFER DATE

UNITED WAY BROKERAGE ACCOUNTS
For credit to: United Way of Greater Charlotte, Inc.

FIRM	ACCOUNT #	CONTACT
Wells Fargo Advisors	7966-2850 DTC#0141	Harry Thompson 704.341.4833
Merrill Lynch Wealth Management	7RU-02015 DTC#8862	Kimberly Estevez 704.339.2032

PRINT FORM