

GIFTS OF STOCK

Gifts of stock are sold as soon as possible.

Donor Instructions: The following is posted on the UWSJC web-site

“How to make gifts of Stock”

You may transfer stock as payment of a gift through either the issuance of a stock certificate or through a wire transfer of securities from your house account into the United Way account at our brokerage firm.

If you wish to transfer a stock certificate directly to the United Way, have the front of the certificate issued to the United Way of St. Joseph County. Do **not** sign the back of the certificate. Securities mailed to us should be sent by registered or certified mail with return receipt requested.

If you wish to transfer a stock certificate currently in your name to the United Way, sign the back of the certificate exactly as your name appears on the front; date the certificate; write in our brokerage firm as *attorney to transfer* in the space provided on the certificate; and accompany the certificate with a simple letter to our brokerage firm stating that:

“The enclosed stock certificate [*# shares of XYZ Company*] currently owned by [*your name*] is intended as a donation to the United Way of St. Joseph County. Please transfer these certificates directly to the United Way or call the Director of Finance and Administration, representing the United Way, for further instructions.”

If you wish to electronically transfer stock or mutual funds from your house account, write a letter to your broker (with a copy to the United Way) authorizing the transfer of [*# shares of XYZ Company or Fund*] to the United Way of St. Joseph County’s account # 7151-1316 at LPL Financial (DTC #0075).

This letter is critically important as it is needed to identify the stock tendered as the payment on your gift.

Valuation for tax purposes

Following the standards of major philanthropic institutions, the United Way determines the value of your gift based on the value of the stock on the ***date it is gifted***, using the average of the high and low prices the stock traded on that day. The ***gift date*** is the date that the properly executed securities are either postmarked (if mailed), received at the United Way offices (if hand delivered) or are wired into a United Way account. ***To determine the value of the gift for tax purposes, the United Way must have either a stock certificate or confirmation from a broker that a transfer has been completed.***

Important addresses

United Way of St. Joseph County, 3517 E. Jefferson Blvd, South Bend, IN 46615
LPL Financial, 2602 Mishawaka Avenue, South Bend, IN 46615