

**LIVE UNITED**



United Way of the Big Bend

## HOW TO TRANSFER STOCK

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### Stock Transfer

Giving long-term (owned more than a year), appreciated securities may provide greater benefits to you and United Way of the Big Bend!

### Simple Steps for Giving

If you would like to make a gift of stock to your United Way of the Big Bend, we would be happy to provide stock transfer instructions to you. It is a simple, straightforward process.

You can call or write to your broker, and ask your broker to initiate a "broker to broker" transfer. You would instruct your broker to donate the stock directly to United Way of the Big Bend.

The United Way of the Big Bend will provide you with the name of their brokerage firm, the brokerage firm's DTC number, the account name and number, and the telephone number and name of their broker contact at the firm.

Your broker can then transfer the securities directly to the United Way's account. It is important that the securities be transferred to United Way's account **prior to being sold** in order to **avoid capital gains taxation**.

### Contact us

If you have any questions about charitable gift annuities, please contact us at 414.0844. We would be happy to assist you and answer your questions.

**LIVE UNITED**™