



Instructions for Transferring Gifts of Stock/Securities to United Way of the CSRA

1. Please send written instructions (or a completed broker transfer form from your broker's institution) to your broker specifying that you wish to make a charitable contribution to United Way of the CSRA. At a minimum, please include the five items below in your transfer instruction document:
 - a. include the issuer of the securities (type of stock) and/or ticker symbol
 - b. include the number of shares (or the minimum gift value)
 - c. instruct them to transfer to Wells Fargo Advisors account # 88352269
 - d. include "this account belongs to United Way of the CSRA, Federal Tax ID #58-0566155"
 - e. specifically request that the donors First and Last Name are transferred with the details, otherwise they will not release your name and we will not know how to acknowledge the gift

2. Your broker should transfer securities to United Way of the CSRA via the broker account listed below.

Broker Firm: Wells Fargo Advisors
Account # 88352269
DTC # 0141
Phone: 800.872.3377

3. Please notify Debbie Brown so that United Way of the CSRA will expect the transfer of securities and provide the proper tax documents to you. The broker will not automatically notify Debbie, so please do not omit this step when the transfer is initiated or completed. A fax or email copy of the transfer instructions from step #1 above will suffice.

Here is her contact information:

United Way of the CSRA
Debbie Brown, Director of Finance
P.O. Box 1724
Augusta, GA 30903
Phone: 706.922.8926
Fax: 706.922.8985
Email: dbrown@uwcsra.org

Thank you for your support of United Way of the CSRA!