



SIMPLE STEPS FOR GIVING A GIFT OF SECURITIES TO UNITED WAY

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

Call or write to your broker and ask to initiate a “broker to broker” transfer. You would instruct your broker to donate the stock directly to United Way of Natrona County.

The United Way would 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.

Email us for more information or with any questions, office@unitedwaync.com