



## PROCESS FOR GIVING STOCK TO UNITED WAY

### Option I, Donor has actual stock certificates:

- Give United Way the stock certificates
- Donor signs back of stock, signature should be the same as registered owner of the stock
- United Way will deliver certificates to broker
- Stock will be sold by the end of the next business day
- Receipt will be for the amount received upon sale
- Can be completed within a week

This can be the fastest method

### Option II, Donor wishes to transfer from own Broker:

- Contact Cathy Snyder at United Way (888-6100 ext 254) to confirm donor name, name and number of stock to be transferred
- United Way's broker name and account number will be given to the donor's broker
- Stock will be sold by the end of the next business day after being received by United Way's broker (providing United Way is informed of the transfer plan, either verbally or via e-mail)
- Receipt will be for the amount received upon sale
- May take a number of weeks to transfer stock
- Please note: because of delay in transfer, the receipted amount may be less than on the date of transfer from original donor

*Note: United Way may also accept gifts of mutual funds although this process may take two to three weeks to complete the more complicated transfer and sale.*

**United Way contact for gifts of Stock:**  
Cathy Snyder, Chief Financial Officer  
888-6100 ext 254 [csnyder@uwaykw.org](mailto:csnyder@uwaykw.org)