



MAKING A

GIFT OF SECURITIES

Making a gift of securities offers you the chance to support work within your community while also receiving important personal benefits. Securities and mutual funds that have increased in value and been held for more than one year are one of the most popular assets to donate.

Through a gift of appreciated stock, you receive a **charitable income tax deduction** for the full fair market value of the securities, while also helping you **avoid capital gains taxes** on appreciated stock. This allows you to maximize your gift.

STEPS TO GIVE

- 1 Direct your broker or agent to transfer shares from your account into the **"United Way Inc."** account at Merrill Lynch, **account number 814-04354, DTC #8862.**

OR

- 2 If you have physical possession of the stock certificate, sign the back where indicated, write "Merrill Lynch" on the attorney line on the front and deliver or send to:

Merrill Lynch, attn: Claudine Zigmund
City Place II
185 Asylum Street, 14th Floor
Hartford, CT 06103

- 3 Notify, or have your broker notify, **United Way** at **tlaing@unitedwayinc.org** when transfer has been completed. In your email, please include your name, as well as the number and type of shares.

Please contact **Claudine Zigmund** at **860.728.3984** with questions about stock certificates, powers and additional paperwork, as well as notification of incoming stock transfers.

ITEMS TO REMEMBER



The date of the stock gift is the day the right of ownership of the stock is effectively transferred to United Way.



The value for tax purposes is the mean between the high and low quoted selling prices on that day.



Your gift will be acknowledged by United Way with the valuation of your gift for tax purposes.



Always consult your personal financial or tax advisor in advance to see how a gift of securities can benefit you.

For general questions regarding your United Way donation, please contact **Kim Reeves** at **kreeves@unitedwayinc.org**.