



United Way of Tucson and Southern Arizona

UnitedWayTucson.org

Please send the following information to your broker. Due to broker privacy policies, your stock transfer may be anonymous. To identify your donation, please send a copy of this letter and/or provide the following information by mail, fax or email to United Way of Tucson and Southern Arizona attn: George Schlecht, 330 N. Commerce Park Loop, Suite 200 Tucson, AZ 85745-6750 | phone (520) 903-3945| fax (520) 903-9002 | email: gschlecht@unitedwaytucson.org

### STOCK TRANSFER DONATION LETTER

\_\_\_\_\_  
(donor's name)

\_\_\_\_\_  
(date)

Dear \_\_\_\_\_ :  
(donor's broker)

I wish to donate \_\_\_\_\_ shares of \_\_\_\_\_ held in my \_\_\_\_\_  
(number) (name of security) (name of brokerage)  
account, # \_\_\_\_\_, to United Way of Tucson and Southern Arizona. Please transfer \_\_\_\_\_  
(account number) (number)

shares to the United Way of Tucson and Southern Arizona brokerage account as follows:

**Depository Trust & Clearing Corporation (DTC)**

**Participant ID: 2663**

**SEI Trust**

**Agent Bank: 16919**

**BMO Harris Bank N.A.**

**For Further Credit to the United Way of Tucson and Southern Arizona, Account #000001389954**

**If the transferring firm has any questions, please have them contact:**

Michael Beals, Senior Portfolio Manager

BMO Private Bank, 1755 E. Skyline Drive, Suite 101, Tucson AZ 85718

[Michael.beals@bmo.com](mailto:Michael.beals@bmo.com)

(T) 520-577-5766 (F) 520-299-0067

This donation represents my current pledge to United Way of Tucson and Southern Arizona, EIN 86-0098932. Please forward my name with the stock transfer for gift verification purposes, including the following information about my gift designation:

- 1)  I'd like to invest in UWTSA's most strategic way to make an impact in my community (general funds).
- 2)  Attached is a pledge form with more information about how to put my contribution to work.

If you have any questions about this donation, please call or email me at \_\_\_\_\_ or \_\_\_\_\_.  
(phone number) (email address)

Sincerely,

\_\_\_\_\_  
(donor's signature)