

Giving Gifts of Stocks and Securities to United Way of Southeastern Pennsylvania

There are two ways to donate securities to the United Way of Southeastern Pennsylvania.

1. Gifts of securities to United Way of Southeastern Pennsylvania may be made through your broker, which is the easiest method of donation. Your broker should do the following:

- Notify United Way of Southeastern Pennsylvania by phone, at 215-665- 2564, of the gift of securities.
- Initiate a DTC Transfer using the following information:

**Credit to Vanguard Brokerage Services
Sub Account, United Way of Southeastern Pennsylvania
Account # 60253979
DTC# 0062
The donor's name must appear in the trailer information of the DTC transfer.**

2. If you do not wish to use a broker, you can transfer the securities directly to United Way of Southeastern Pennsylvania:

- The securities must be endorsed by the registered owner. The registered owner must consult his or her broker or bank to obtain a "medallion signature guarantee" for the back of the certificate. *A notary public cannot provide a medallion signature guarantee.*
 - The registered owner should insert "United Way of Southeastern Pennsylvania (EIN 23-1556045)" as the transferee party on the back of the certificate.
 - The registered owner should insert "Vanguard Brokerage Services" as the attorney-in-fact on the back of the certificate.
 - Once the back of the certificate is completed with a medallion signature guarantee, it can be sent to United Way of Southeastern Pennsylvania at the address below.
- **The date of the gift is the day the securities pass to United Way of Southeastern Pennsylvania's control.**
- **United Way of Southeastern Pennsylvania cannot accept donations of "controlled" or "restricted" securities, as these terms are defined by the Securities Act of 1933. Please consult your attorney if you have any questions or are interested in donating such securities.**
- **United Way of Southeastern Pennsylvania cannot accept gifts of partial shares of stock, nor can United Way of Southeastern Pennsylvania refund shares of stock to donors.**
- **For income tax purposes, the deductible value is the mean between the high and low quoted selling price on the date of the gift.**

**United Way of Southeastern Pennsylvania
Seven Benjamin Franklin Parkway
Philadelphia, PA 19103-1294**

**Stock Donation Line
215.665.2564**

Vanguard Brokerage Services is a division of Vanguard Marketing Corporation.

www.LIVEUNITEDsepa.org/Stocks

In order to recover expenses incurred to raise, collect and allocate contributions, United Way of Southeastern Pennsylvania charges a cost recovery fee of 12.5% on each donated gift.