

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 (UWSEPA).

1. Gifts of securities to UWSEPA may be made through your broker, which is the easiest method of donation. Your broker should do the following:
 - Notify UWSEPA by phone, at 215-665-2488, of the gift of securities.
 - Initiate a DTC Transfer using the following information:
Pershing LLC, a member of the BNY Securities Group and a subsidiary of
The Bank of New York Company, Inc.
Credit to Vanguard Brokerage Services
Sub Account, United Way of SE Pennsylvania
Account # A4V431079
DTC # 0443
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 UWSEPA:
 - 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 “Pershing, LLC, a member of the BNY Securities Group and a subsidiary of The Bank of New York Company, Inc.” 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 UWSEPA at the address below.
 - ❖ The date of the gift is the day the securities pass to United UWSEPA's control.
 - ❖ UWSEPA cannot accept donations of “control” 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.
 - ❖ 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
7 Ben Franklin Parkway
Philadelphia, PA 19103
Stock Donation Line
215-665-2488

Vanguard Brokerage Services is a division of Vanguard Marketing Corporation.

www.uwsepa.org

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.

