

# STOCK TRANSFER



United Way  
of the Greater Triangle

**NOTE: Your broker must include your name on the transfer in order for United Way of the Greater Triangle to identify and acknowledge your gift.**

## Four easy check points to speed your gift of securities.

- Fill out this form completely
- Mail or fax a copy to your broker
- Email a second copy to the United Way: [pledges@unitedwaytriangle.org](mailto:pledges@unitedwaytriangle.org)
- Retain the original for your files

\_\_\_\_\_  
Broker's Name

\_\_\_\_\_  
Brokerage House

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Date

Dear Broker,

Please accept this authorization to transfer \_\_\_\_\_ shares of \_\_\_\_\_ stock from my account with your firm, to the account of United Way of the Greater Triangle, # **WA8076038** with Truist Investment Services via DTC Clearing # **0226**.

Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_ Print Donor Name \_\_\_\_\_ Signature of Donor

**Please direct questions to:**

United Way of the Greater Triangle Finance Office - 919-460-8687 or [pledges@unitedwaytriangle.org](mailto:pledges@unitedwaytriangle.org)

***Thank You!***