



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](mailto: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:**

**2039**

**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)