

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:

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

(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)