



## Donating Stock

Stock can be donated to United Way of Lake County in several different ways:

1. If the stock you wish to donate is held in your account at your brokerage firm, the broker can be instructed to electronically transfer the securities to United Way of Lake County. United Way of Lake County maintains a brokerage account at:

**Wells Fargo Advisors, LLC**  
1044 N Western Avenue Ste A  
Lake Forest IL 60045

**Account number: 8998-1280**  
Mr. Robert Weis CFP, Managing Director, Investments  
Phone: 847-482-8828, Toll Free: 800-934-9664  
Fax: 847-234-9678

**When transferring shares electronically, please use DTC Number 0141 (First Clearing Corp).  
United Way of Lake County's Federal Identification Number is 36-2167949.**

Note: *You should request that your broker call Wells Fargo to advise them of the transfer prior to the actual transfer. It is also important that United Way of Lake County be advised of your name so the gift can be properly recorded and your generous donation acknowledged by calling the Finance Department at (847) 775-1000. For tax purposes, the gift is complete on the date of transfer to United Way of Lake County's account.*

2. If the stock certificates you wish to donate are in your possession, you can accomplish the transfer in one of the following ways:
  - Send the shares to the transfer agent of the company in which you hold shares and request that they transfer the stock into the name of United Way of Lake County. The shares, once transferred, can then be forwarded to United Way of Lake County. In most cases, the transfer agent will forward the shares on your behalf. Again, it is important that United Way of Lake County's Finance staff be advised of your name so the gift can be properly recorded and your generous donation acknowledged at (847) 775-1000. For tax purposes, the gift is complete on the day the transfer takes place.
  - Send the unendorsed certificates and a signed stock power to United Way of Lake County in separate envelopes. Your signature should be guaranteed, which can be done at most financial institutions. For tax purposes, the gift is complete on the date of postmark on the later of the two envelopes.

The stock power is available from any broker. United Way of Lake County can also provide one. The stock power indicates your intention to transfer the shares of stock. You should also include a cover letter with your specific intent with respect to the shares of stock enclosed. Again, this will enable United Way of Lake County to handle the stock according to your wishes, record the gift in the proper account and acknowledge your donation.

- Stock certificates can be personally delivered with all the necessary endorsements to United Way of Lake County, 330 South Greenleaf Street, Gurnee, IL 60031-3389. For tax purposes, the gift is complete on the day of delivery.

For additional information, please contact the Pam Zalinger at United Way of Lake County, 330 South Greenleaf Street, Gurnee, IL 60031, (847) 775-1024 or pzaligner@uwlakeco.org. It is always advisable to consult with your tax advisor or attorney.