

# giving securities – the benefits

- Significant tax advantage
- Avoid capital gains tax on the sale of appreciated securities
- Low out-of-pocket cost to you, while making a significant contribution to your community through United Way of Greater Houston
- Receive income tax deductions for the full current value of the donated securities



## FOLLOW THESE STEPS:

<p>You may transfer your securities electronically from your brokerage firm to the United Way's account at its primary broker Wells Fargo or one of the other major firms in this area.</p>	<p>Contact Reseian Gaither, Finance Department at (713) 685-2877 or <a href="mailto:rgaither@unitedwayhouston.org">rgaither@unitedwayhouston.org</a> at the United Way for account information and transfer instructions.</p>	<p>United Way will acknowledge your gift and an IRS substantiation letter will be provided to you. Please allow at least 30 days for receipt of your IRS letter.</p>
<p>If you hold stock certificates: You may have the stock certificate reissued in the name of the United Way of Greater Houston. The certificate should then be delivered or mailed by Registered Mail to:</p> <p>United Way of Greater Houston 50 Waugh Drive Houston, Texas 77007-5813 Attention: Reseian Gaither Finance Department</p>	<p>Or, you may send a stock certificate with your name listed on the front and with ownership signed over to the United Way of Greater Houston on the back. Then, it can be delivered or mailed by Registered Mail to the address previously listed.</p>	<p>The United Way broker will sell the stock and a United Way representative will acknowledge your gift. An IRS substantiation letter also will be provided to you. Please allow at least 30 days for receipt of your IRS letter.</p>

The following is the information you will need to have your stock contribution transferred to the United Way by your broker:

Broker: Wells Fargo  
 Broker Acct: 6242-5584  
 DTC No.: 0141  
 Broker Contact: Mike Schultz  
 713-827-4933  
 UW Tax ID#: 74-116-7964

**Please request that your name (donor's name) is included on the transfer information to ensure proper credit.**

Also, contact Reseian Gaither at (713) 685-2877 or [rgaither@unitedwayhouston.org](mailto:rgaither@unitedwayhouston.org) to confirm number of shares and type of stock you will contribute for proper credit to your pledge account.

Thank you for your generous contribution.  
 You help United Way do something about it.

