

## United Way Stock Donation Instructions

The following options are available to donors donating stock to United Way:

**Option 1:** Contact your broker to sell your stock and provide the following contact information, so that, the broker can submit a check and confirmation of the sell to United Way for the proceeds:

Jessica Claiborne, Accounting Manager  
United Way of Greater Richmond & Petersburg  
P.O. Box 11807 Richmond VA 23230 (mailing address)  
Email: [claibornej@yourunitedway.org](mailto:claibornej@yourunitedway.org)  
Phone: (804) 771-5830

Alternative Contact:  
Paul J. Hunter, Vice President, Finance  
Email: [hunterp@yourunitedway.org](mailto:hunterp@yourunitedway.org)  
Phone: (804) 771-5888

**Note:** *Please inform the broker that your intent for the proceeds is to be used as your United Way donation.*

**Option 2:** Transfer the stock to one of the brokerage firms (*see attached listing*). Please provide the firm's name, donor's name, United Way's account number, the contact person's name (if available) and telephone number. Please send a letter to United Way stating the type of stock, number of shares, date of transfer and brokerage firm's name. Also include your intent for the proceeds are to be used as your United Way donation. The account will be monitored to ensure a prompt sale.

### **All stock deliveries, letters of intent and telephone calls are to be directed to:**

Patricia Steward-Rogers, Accounts Receivable Manager  
United Way of Greater Richmond & Petersburg  
P.O. Box 11807 Richmond VA 23230 (mailing address)  
Email: [rogersp@yourunitedway.org](mailto:rogersp@yourunitedway.org)  
Phone: (804) 771-5895

*Tax receipts for stock donation(s) will be generated upon receipt of payment from the brokerage firm for the mean value of the stock, per IRS regulations.*

**UNITED WAY GREATER RICHMOND and PETERSBURG  
STOCK BROKERAGE LISTING**

<b>FIRM NAME</b>	<b>UW ACCT&amp; DTC#</b>	<b>CONTACT PERSON</b>	<b>TELEPHONE #</b>
<b>Davenport &amp; Company</b> <i>(Pershing)</i>	<b>DTC# 0443</b> <b>Account# DA4004937</b>	<b>Virginia Wortham Kehlenbeck or</b> <b>Ashley D'Alessandro</b>	<b>(804) 780-2000</b>
BB&T Scott & Stringfellow	WA7129200-DTC #0226	Linda W. Ludeke	(804) 780-3265
Merrill Lynch	857-04N06-DTC 5198	Rick Bottini	(800) 338-2814, X5058
T.RowePrice	7150066979-2		(800) 225-5132
UBS Financial	VH 00904 34	Susanne Keesler	(804) 775-1532

**Bold Print denotes preferred brokerage Firm**