



GREATER CLEVELAND

STOCK INSTRUCTIONS

Making a Charitable Gift of Stock (Appreciated Securities)

Donors donate publicly traded securities as an attractive alternative to cash. Donating appreciated securities usually provides a tax deduction for the fair market value of the shares and avoids capital gains tax which occurs if shares are sold by the individual.

It is important that donors follow these instructions and notify United Way of their intention to make a gift of stock to ensure that the transaction is received.

The donor provides instructions to their stock broker indicating the following information:

1. Instruct broker as to the effective date of the gift.
2. Identify the name of the stock issued and number of shares being donated.
3. Provide instructions to United Way regarding their gift.
4. Contact PNC Investments to transfer stock into United Way's brokerage account.
5. Call or email Ms. Elaine Marquard (Contact information is below).

Name of Receiving Institution:	PNC Investments
Telephone No:	(216) 222-2320
Receiving Institution Account No:	005-513848
DTC No:	0226
Account Title/Registration:	United Way of Greater Cleveland
United Way Tax ID#	34-6516654
UWGC Contact:	Elaine Marquard
Telephone No:	(216) 436-2151
Email Address:	emarquard@unitedwaycleveland.org

To have a clear record of your gift, we request a copy of any letter of instructions which you provide to your broker/client be sent to United Way. Please make sure the gift date is clearly identified. If no gift date is provided, the date the stock is received by PNC Investments will be used.

United Way will send an acknowledgment letter to the donor after the stock is sold. The stock is valued at the median market value using the gift date.

Thank You!