



United Way  
of Pioneer Valley

## ***Procedure for Donating Stock to the United Way of Pioneer Valley***

### **If Securities are held in the hands of a stock broker:**

Instruct your stock broker as to quantity and description of the shares you want transferred to the United Way of Pioneer Valley.

### **Provide your stockbroker with the following information regarding the United Way of Pioneer Valley:**

- |                          |                              |
|--------------------------|------------------------------|
| A. Account Name:         | United Way of Pioneer Valley |
| B. Brokerage Firm:       | UBS Financial Services       |
| C. Financial Consultant: | Patrick Donnelly             |
| D. Phone Number:         | 413-785-4900                 |
| E. DTC Number:           | 0221                         |
| F. Account Number:       | VZ 45672 DM                  |
| G. Tax ID Number:        | 04-2152680                   |

Your broker will then take the necessary steps in order to transfer the stocks.

### **Please ask your broker to contact United Way of Pioneer Valley with the following information:**

**(Donor's name)** has just made a gift of **(# of shares)** of **(name of stocks)** effective **(date of transfer)** to United Way of Pioneer Valley account at UBS Financial Services. You should call Patrick Donnelly to inform him of the gift's transfer; do not rely on the donor's broker to do this. Mr. Donnelly will notify us of the gift through a letter including the date of transfer and mean value per share.

### **If securities are held by you, you may hand deliver or mail the certificates to:**

Patrick Donnelly  
UBS Financial Services, Inc.  
1 Monarch Place, Suite 1400  
Springfield, MA 01144

A stock power and security release form must be signed and mailed in a separate envelope. These forms may be obtained at the office of Patrick Donnelly.

### **If you need further information or if you need assistance with either of these procedures, please contact:**

Raymond Berry  
Sr. Vice President Finance & Administration  
United Way of Pioneer Valley  
1441 Main Street, Suite 147  
Springfield, MA 01103

Patrick Donnelly  
UBS Financial Services, Inc.  
1 Monarch Place, Suite 1400  
Springfield, MA 01144