GIFT OF STOCK

Thank you for selecting United Way as the recipient of your charitable donation. Some of the potential benefits of donating appreciated securities include:

- Avoid paying capital gains tax
- Receive a charitable income tax deduction
- Enjoy possible increased income
- Further our mission

Donating stock is a simple process that takes only a few minutes. In just two easy steps you can invest in United Way to help advance the common good in our communities:

1. **Step One**
   - Authorize your broker or financial consultant to transfer the stock as a contribution to United Way.
   - **Account Name:** United Way of Northern New Jersey
   - **Brokerage Firm:** Merrill Lynch
   - **Contact Name:** Erica Matloff
   - **Phone:** 631.204.2386
   - **Account#:** 857-84118
   - **Federal Tax ID#:** 22-1487247
   - **DTC#:** 8862

2. **Step Two**
   - Inform United Way of the transfer by contacting:
     - Steve Miller, P.O. Box 6835
     - Bridgewater, NJ 08807
     - 973.993.1160, x522
     - Steven.Miller@UnitedWayNNJ.org
   - Please be prepared to advise us of the following:
     - Name of donor
     - Name of security
     - Number of shares intended
     - Proposed date of transfer

After the stock is received, we will send you an acknowledgment letter as confirmation of your gift. The letter can also be used for tax purposes.