



STOCK/SECURITIES GIFT TRANSFERS

Thank you for your contribution and generosity!

United Way of Greater Stark County has electronic transfer accounts with Roger A. Piper - Morgan Stanley. If your stock is held with this broker/dealer, a direct transfer of your gift can be made by giving Roger Piper the corresponding account number: **737-028077-0-022**.

If your stock or security is held by another broker/dealer, please send it to Roger A. Piper – Morgan Stanley. Your broker/dealer will need the following information:

Roger A. Piper – Morgan Stanley – United Way of Greater Stark County's Broker
0015 – the DTC number for Roger A. Piper – Morgan Stanley
Account# 737-028077-0-022
Contact: Carol Hoffman – (330) 491-4009 for transfer issues
Federal Tax ID: 13-4254191

Mailing Address for Roger. A Piper – Morgan Stanley:

Morgan Stanley
4455 Dressler Rd NW
Suite 202
Canton, OH 44718

ATTN: Roger Piper

A few points to mention:

- Stock transfer require both "sender" and "receiver" to know when the transfer will take place.
- Please notify Cristina Torrence, Chief Financial Officer at United Way of Greater Stark County when your gift is about to transfer and also provide the name of your broker/dealer.
- Security transfers are not completed until the next business day. This is important in December, if you wish United Way of Greater Stark County to receive your gift prior to the end of the tax year.
- Your gift of stock is valued, for tax purposes, at the mean of the high and low on the date the shares are received in our account.

If you have further questions, please contact:

Cristina Torrence, Chief Financial Officer
United Way of Greater Stark County
cristina.torrence@uwstark.org
330-491-9961

STOCK TRANSFER FORM

Thank you for supporting United Way of Greater Stark County (UWGSC)! Your generosity advances our mission to alleviate the hardships caused by poverty in our communities, and we are dedicated to creating lasting change. To make a stock donation, please complete the form below. Thank you!

STEP 1: Provide the following information to your broker:

Recipient: United Way of Greater Stark County Federal Tax ID: 13-4254191

Firm: Roger A. Piper – Morgan Stanley

4455 Dressler Rd NW | Suite 202 | Canton, Ohio 44718

Contact: Carol Hoffman at (330) 491-4009

Account #: 737-028077-0-022

DTC #: 0015

STEP 2: Complete the form below to enable UWGSC to match incoming securities to your donation record.

If you want to receive a tax receipt, please include your name, contact info and security detail information when you submit your transfer.

Donor Name: _____

Address: _____

Phone: _____ Email: _____

Employer: _____

Brokerage Firm Name: _____

Brokerage Name: _____ Broker Phone: _____

Name of Security/Symbol: _____

Number of Shares: _____ Est. Value: _____

Special Instructions: _____

STEP 3: Submit this form to United Way of Greater Stark County.

Contact: Cristina Torrence, Chief Financial Officer

Via Email: cristina.torrence@uwstark.org

Via Mail: 401 Market Avenue North, Suite 300, Canton, Ohio 44702

