

MILE HIGH UNITED WAY GIFT OF STOCK



Thank you for your interest in making a charitable gift to Mile High United Way in the form of a Stock Transfer.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to Mile High United Way. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to make a donation of stock to Mile High United Way (Tax ID# 84-0404235), please initiate a "broker to broker" transfer using the following information:

- Brokerage House: USB Financial Services
- Account Name: Mile High United Way
- Account Number: DK-04687-55
- DTC Number: 0221
- Financial Advisor: Steve Costanza
- Email: steven.costanza@ubs.com
- Telephone Number: (303) 689-2644
- Fax Number: (855) 497-2368

- Reference: Donor Name (Including your name will ensure the gift is properly acknowledged.)

****Please Note:** For mutual fund gifts, or for gifts of stock not held in a brokerage account, please contact the Financial Advisor listed above.**

Tax Credit Eligibility

Stock gifts invested in a Denver Enterprise Zone (DEZ) eligible program - Bridging the Gap, 2-1-1 Help Center, and United Neighborhoods - qualify for a 12.5 percent tax credit. If an additional cash gift is made (stock value divided by 7), the tax credit eligibility increases to 25 percent.

Please complete the information below to notify Mile High United Way of your gift and help ensure it is processed accurately. Please email the completed information to stock@unitedwaydenver.org.

Donor & Securities Information:

Donor Name (Individual, Corporation, Foundation)

Name & Type of Securities (e.g.: DELL common stock)

Security Symbol

Number of Shares

____/____/____
Transfer Date

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

My employer will match my gift.

I am interested in learning more about the DEZ tax credit.

For questions, please contact stock@unitedwaydenver.org or (303) 561-2355.

Thank you for supporting Mile High United Way through your charitable giving!