MAKING A GIFT OF SECURITIES



Making a gift of securities offers you the chance to support work within your community while also receiving important personal benefits. Securities and mutual funds that have increased in value and been held for more than one year are one of the most popular assets to contribute. Through a gift of appreciated stock, you receive a charitable income tax deduction for the full fair market value of the securities, while also helping you avoid capital gains taxes on appreciated stock. This allows you to maximize your gift.

STEPS TO GIVE

1. Direct your broker or agent to transfer shares from your account into the "United Way of Metropolitan Chicago" account at Morgan Stanley, account number 358-047481, DTC #0015.

   OR

2. If you have physical possession of the stock certificate, sign the back where indicated, write "Morgan Stanley" on the attorney line on the front and deliver or send to:

   Morgan Stanley Wealth Management
   Willis Tower
   233 S. Wacker Drive Suite 8600
   Chicago, IL 60606

3. Please fill out the Gift of Stock form online at LIVEUNITEDchicago.org/Stock-Gift to notify United Way of Metro Chicago upon initiating the transfer of shares to ensure we credit the gift to you and issue a tax receipt for your donation.

   Please contact **Mary Pat Rooney** at marypat.rooney@LIVEUNITEDchicago.org or **312.906.2238** with questions about stock certificates, powers and additional paperwork, as well as notification of incoming stock transfers.

ITEMS TO REMEMBER

- The date of the stock gift is the day the **right of ownership of the stock** is effectively transferred to United Way.
- The value for tax purposes is the mean between the **high and low quoted selling prices** on that day.
- Your gift will be acknowledged by United Way with the **valuation of your gift for tax purposes.**
- Always consult your **personal financial or tax advisor** in advance to see how a gift of securities can benefit you.

QUESTIONS? For general questions regarding your United Way donation, please contact our Help Desk at **312.906.2204** or donorhelp@LIVEUNITEDchicago.org

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