

Make a Lasting Gift to Your Community - Donate Stock -

Donating stock to the United Way is a quick and easy process. Just follow the steps to make an investment to the greater Rochester community.

STEP 1:

Send a letter to your broker or financial consultant to authorize the transfer of stock as a contribution to United Way of Greater Rochester.

Include the following details in your letter:

- Name of the stock
- Number of shares
- Expected date of transfer
- Your mailing address
- Your work and home phone number

Please Note- Revised as of May 7, 2012

Transfer Information:

- Broker: Morgan Stanley Smith Barney
- Account: United Way of Greater Rochester Inc.
- Account Number: 881-109558-278
- DTC #0015

For more information please contact:

Laurie Ganon: United Way of Greater Rochester

Phone Number: (585) 242-6532

OR

Jodi Groden: United Way of Greater Rochester

Phone Number: (585) 242-6418

STEP 2:

For acknowledgement and tax purposes, United Way of Greater Rochester must receive a copy of your letter. Please e-mail a copy of your letter to laurie.ganon@uwrochester.org or fax it to (585) 242-6530.

Or, you can mail the copy to:

Jodi Groden

Executive Vice President and Chief Financial Officer

United Way of Greater Rochester

75 College Avenue

Rochester, NY 14607

After the stock is received, United Way of Greater Rochester will send you a confirmation letter, which may be used for tax purposes.

Thank you.