



**Donating Stock to United Way**

Assign or transfer your stock securities to United Way of Johnson & Washington Counties.

**Step 1:** Send a letter to your broker to authorize the electronic transfer of stock as a contribution to the United Way of Johnson & Washington Counties. Include the following details in your letter: name of stock, number of shares, expected date of transfer, your mailing address and your work and home phone numbers.

**Our brokerage information is as follows:**

United Way Brokerage Acct.	DTC Number	United Way Acct. #	Contact Name	Contact Info
Pershing LLC fbo United Way of Johnson & Washington Counties Cambridge Cashiering	0443	JEK114890	Alicia Mitros	(319) 358-7700 <a href="mailto:alicia@bfsplan.com">alicia@bfsplan.com</a>

**Step 2:**

Please send a copy of your letter to United Way of Johnson & Washington Counties at [info@unitedwayjwc.org](mailto:info@unitedwayjwc.org) and to our broker Alicia Mitros at [alicia@bfsplan.com](mailto:alicia@bfsplan.com), or call us at 319-338-7823 to ensure your gift is properly acknowledged. For further questions, please contact Emma Barnum at [Emma.Barnum@unitedwayjwc.org](mailto:Emma.Barnum@unitedwayjwc.org).

**Step 3:**

Once the stock is received, United Way of Johnson & Washington Counties will send you a confirmation letter that may be used for tax purposes.

Thank you for your support in creating a strong community for all.