

## Stock Transfer Form

United Way of the  
Columbia-Willamette



*Thank you for supporting United Way of the Columbia-Willamette (UWCW)! Your generosity advances our mission to improve lives, strengthen communities and advance equity by mobilizing the caring power of people (like you!) across our region. 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 the Columbia-Willamette  
Tax ID: 93-0582124

Bank: US Bancorp Wealth Management  
321 SW 6<sup>th</sup> Avenue, Portland, OR 97204  
Contact: Eric Pifer – 503.944.4064 or [eric.pifer@usbank.com](mailto:eric.pifer@usbank.com)

Account #: 23022635  
DTC #: 0280

### STEP 2: Complete the form below to enable UWCW 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 \_\_\_\_\_

Broker Name \_\_\_\_\_ Broker Phone \_\_\_\_\_

Name of Security/Symbol \_\_\_\_\_

Number of Shares \_\_\_\_\_ Est. Value \_\_\_\_\_

Special Instructions \_\_\_\_\_

### STEP 3: Submit this form to United Way of the Columbia-Willamette.

**Contact:** Ronecca Norvell, Director of Donor Relations – 503.226.9344

**Via email:** [roneccan@unitedway-pdx.org](mailto:roneccan@unitedway-pdx.org)

**Via mail:** United Way of the Columbia-Willamette  
619 SW 11<sup>th</sup> Avenue  
Portland, OR 97205