

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 Bank Charitable Services Group
111 SW Fifth Avenue, Suite 600 | Portland, OR 97204
Contact: Leanne Stanfill – 503.464.4910 or leanne.stanfill@usbank.com

Account #: 080018231900
DTC #: 2803

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

Via mail: United Way of the Columbia-Willamette
619 SW 11th Avenue
Portland, OR 97205