

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: Michelle House, Director of Gift Processing – 503.226.9383

Via email: donations@unitedway-pdx.org

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