

# 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](mailto: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](mailto:donations@unitedway-pdx.org)

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