

Stock Donations to United Way of Larimer County



1. Thank you for your interest in supporting United Way of Larimer County through a donation of stock. In order to process your donation, your broker will need the following information:

Charles Schwab Contact: Steve Knapp, Financial Consultant, 970-223-5520

Wire instructions for DTC securities:

DTC clearing 0164, code 40

Account name: United Way of Larimer County

Account number: 3392-1426

2. It is important that United Way of Larimer County receives notice from you that a donation of stock has been made. Otherwise, your stock will arrive in our account with only a transfer date and number of shares. Once you've transferred stock please notify us with the following information: transfer date, number of shares and name and/or stock symbol. This allows us to quickly verify that the transaction was processed correctly, and ensures that each donor is receiving acknowledgment for the correct gift. Please send this notification to Diane Hathaway using the contact information below.
3. The value of your pledge amount is calculated as follows and according to the IRS rules:
 - The value of stocks and bonds is the fair market value (FMV) of a share or bond on the valuation date.
 - Ordinarily, the valuation date (date of a contribution) is the date that the transfer of the property takes place.
 - If there is an active market for the contributed stocks or bonds on a stock exchange, in an over-the-counter market, or elsewhere, the FMV of each share or bond is the average price between the highest and lowest quoted selling prices on the valuation date.
 - If a donor delivers, without any conditions, a properly endorsed stock certificate to a qualified organization or to an agent of the organization, the date of the contribution is the date of delivery. If the certificate is mailed and received through the regular mail, it is the date of mailing. If a donor delivers the certificate to a bank or broker acting as your agent or to the issuing corporation or its agent, for transfer into the name of the organization, the date of the contribution is the date the stock is transferred on the books of the corporation.
4. Once United Way has verified receipt of the stock, we will calculate your pledge amount. This may differ from the amount you calculate depending on when the transfer takes place. The amount we receive from the sale of stock *does not affect* your pledge amount.

United Way of Larimer County's tax ID number is 84-6031503.

For questions, please contact: Diane Hathaway at 970-407-7009 or dhathaway@uwaylc.org.