

United Way of Gaston County, Inc. Stock Information & Donation Form



The Benefits of Giving Securities

Avoid Capital Gains Taxes

By contributing securities that have appreciated in value to United Way of Gaston County, you avoid the capital gains taxes you would otherwise incur if you sold the securities for your personal benefit.

Take a Charitable Tax Deduction

For federal income tax purposes (including alternative minimum tax purposes), you can deduct the value of securities on the date of your contribution. The net value of your contribution is the average between the high and low quoted selling price on the date the securities passed from your ownership. For your tax purposes, United Way of Gaston County will acknowledge your gift in writing.

Give a Larger Gift

A gift of stock may allow you to make a larger charitable contribution than would be possible with cash or payroll deduction.

Take Advantage of the Ease of Giving Stock

Most gifts can be transferred using this form. For more information, call United Way of Gaston County at 704.864.4554

United Way of Gaston County Stock Transfer Form

NOTE: Your broker must include your name on the transfer form in order for United Way of Gaston County to identify and acknowledge your gift.

Four easy check points to speed your gift securities:

- Fill out this form completely.
- Mail or fax a copy of this page to your broker.
- Mail or fax a second copy of this page to United Way of Gaston County.
- Retain the original for your files.

Broker's Name, Brokerage House

Address

Telephone

Date

over...

Dear Broker:

Please accept this authorization to transfer _____ shares of _____
stock from my account with your firm to the account of United Way of Gaston County, with Bank of
America

Clearing Firm: National Financial Services
DTC #0226
Attention: Brian O'Reagan

Thank You for your assistance in this matter
Sincerely,

Signature of Donor

Print Donor Name

Direct Questions To:
Brian O'Reagan, Bank of America, 704.867.3724
April Cochran, Bank of America, 704.867.3792
Karen Bowman, United Way of Gaston County, 704.864.4554