



**United Way
of Yellowstone County**

STOCK & SECURITIES GIFT FORM

To ensure gifts of stocks and securities are properly received and acknowledged by United Way of Yellowstone County, please 1) complete this form prior to initiating a transfer of a gift of stock, securities, and mutual funds whether delivered physically or electronically and 2) follow the Delivery Instructions for Cash and Securities.

DONOR INFORMATION

Name(s):

Address:

City, ST ZIP:

Phone:

Email:

Gift Purpose: General Operating Endowment Fund

I wish to remain anonymous

GIFT INFORMATION

Securities Name/Ticker:

CUSIP#:

of Shares/Bonds:

Approx. Date of Transfer:

Approx. Value:

Brokerage Firm:

Phone Number:

Broker's Name:

Delivery Method: **Electronic (DTC)** **By Mail** **By Hand**

Return the completed form to the United Way by email, fax, mail, or in person to the following:

United Way of Yellowstone Endowment

2173 Overland Ave Phone: (406) 272-8502 Fax: (406) 252-3830

Billings, MT 59102 Email: finance@uwyellowstone.org

DTC TRANSFER INSTRUCTIONS

DTC #: 2027, Wells Fargo Bank, NA

Account #: 35013000

For credit to: United Way of Yellowstone County, Inc.

Bank contact: Jennifer or Cory (406) 247-8329