

Heart of Florida United Way

Donation of Stock Procedures

The Heart of Florida United Way utilizes the following brokers for the transference of stock:

Raymond James
301 E Pine St Suite 1100
Orlando, FL 32801
(407) 246-8894
DTC # 0725
Account # 10362562
Broker: Stephen Fricke

Morgan Stanley – Graystone Consulting
250 S Park Ave Suite 500
Winter Park, FL 32789
(407) 740-4900
DTC # 0015
Account # 508106030-0-050
Broker: David S. Isaacson

The following are options for donors contributing stock to the Heart of Florida United Way:

Donors with Stock Held at a Brokerage Firm.

A donation of stock can be transferred via an authorization letter to the donor's broker. The letter should include number of shares, name of stock and intent of contribution to the Heart of Florida United Way. Donors should specify that shares be delivered to **Raymond James** via DTC #0725 for credit to the account of Heart of Florida United Way #10362562, or to **Morgan Stanley** via DTC #0015 for credit to the account of Heart of Florida United Way #508106030-0-050.

Stock Held by the Individual Donor

Stock certificates may be signed over and forwarded to the Heart of Florida United Way. The donation of stock must include the signature of all parties identified on the stock certificate. They must complete a Guaranteed Letter of Authorization from the US Clearing Corporation. We will forward the certificate and a Corporate Resolution to the firm of choice for sale of stock upon receipt.

Determination of Stock Value

The donation amount recorded is based on the average value of the stock on the date it is transferred to the Heart of Florida United Way or the stock certificates are received in our office.

Completion of the Heart of Florida United Way Stock Donation Letter of Intent is required. You can send the document by mail or email to the Heart of Florida United Way Finance Department. The contact information is on the form. This form enables Heart of Florida United Way to trace the stock transfer back to the donor and credit their account properly. A confirmation letter stating the tax-deductible value of the donation goes to all donors and serves as a valid receipt in accordance with IRS regulations. Indicate on the form how you would like to receive the confirmation.

If you have any questions regarding your stock contribution or specific needs not addressed above please contact Valerie Cady Escobedo at (407) 429-2192.

Heart of Florida United Way

Stock Donation - Letter of Intent

A transfer of stock was made or is going to be made to the Heart of Florida United Way for the 2024-2025 campaign.

BROKER TRANSFERRED

DATE OF TRANSFER

NAME OF STOCK

DONOR'S NAME

DONOR ADDRESS:

TELEPHONE: _____

Send to:

**Heart of Florida United Way
Dr. Nelson Ying Center
Finance Department
1940 Cannery Way
Orlando, FL 32804-4714**

Email to finance@hfuw.org

Completion of this form will enable the Heart of Florida United Way to trace the stock transfer back to the donor.

Send Confirmation via:

☐ **Mail to Donor**

☐ **Email:**

☐ **Fax:**

Please direct any questions to Valerie Cady Escobedo in the Heart of Florida United Way Finance Department at (407) 429-2192.

Thank you!

Letter of Authorization

ATTN: _____

RE: ACCT. # _____
IN THE NAME OF: _____

Dear _____:

Kindly accept this letter as your authorization to deliver _____ shares of

from the above referenced account via DTC to: **(SELECT ONE)**

☐ Participant # 0725 - Raymond James
For Credit to Account # 10362562
In The Name Of Heart of Florida United Way

☐ Participant # 0015 – Morgan Stanley
For Credit to Account # 508106030-0-050
In The Name Of Heart of Florida United Way

This gift of stock is to satisfy my pledge. I am aware that I/we are responsible for any “ex-dividend” claims that may arise from this transaction.

Sincerely,

**All parties on account must endorse authorization letter.
If depositing physical shares, please endorse certificates.**