

STOCK GIFTS

For questions or specific information on giving the gift of stock to the United Way of Greater Portland, please contact Wendy O'Rourke, Senior Director, Finance & Operations at 207.347.2325 or by e-mail to worourke@unitedwaygp.org.

A gift of stock can be made in one of three ways:

1. Transfer to a United Way Account

If you have an account at one of the following firms, you may simply transfer the appropriate amount of stock to the United Way account at the same firm. Please contact Wendy O'Rourke (above) by phone or email in order to make certain United Way is aware of your transfer. This will enable us to credit your gift accordingly.

- Fidelity
- Key Investment Services
- RBC Wealth Management
- UBS Financial Services

2. Shares Held by Another Brokerage Firm

If your shares are held by another brokerage firm, instruct them to electronically transfer the stock to Key Investment Services, 256 US Route One, Suite 1, Falmouth, ME 04105 c/o DTC 0443. United Way of Greater Portland's account number is HQ6005693.

Please have your broker notify United Way's account executive, Joshua Milligan, prior to the transfer. His number is 207.781.6410. In addition, please contact Wendy O'Rourke (above) by phone or email in order to make certain United Way is aware of your transfer. This will enable us to credit your gift accordingly.

3. Shares Held by You

If you hold your own shares, please call United Way of Greater Portland at 207.347.2325. We will arrange to pick up your certificates.