



## MAKING A CHARITABLE GIFT OF STOCK

Donating appreciated securities is a simple and effective way to support United Way of Northwest Alabama (UWNWAL). Gifts of publicly traded stock often provide tax advantages, including a charitable tax donation for the fair market value of shares and the ability to avoid capital gains tax that would occur if the shares were sold by the donor.

To ensure your gift is processed accurately and in a timely manner, please follow the steps below.

## STEPS FOR DONORS

1. Instruct the broker regarding the effective date of the gift.
2. Identify the name of the stock and the number of shares being donated.
3. Provide the name of the stock and the number of shares being donated.
4. Contact our receiving broker to transfer the stock into UWNWAL's brokerage account.
5. Call or email UWNWAL's contact person listed below to notify us that the transfer has been initiated.

|                                       |   |
|---------------------------------------|---|
| <b>Name of Receiving Institution:</b> | Riverfront Wealth Management, LLC   |
| <b>Broker Contact:</b>                | Matt Morris   |
| <b>Broker Address:</b>                | 304 E. Dr. Hicks Blvd, Florence, AL 35630   |
| <b>Telephone Number:</b>              | (256) 980-1450  |
| <b>Receiving Account No.</b>          | 5790-2359   |
| <b>DTC No.</b>                        | 0141  |
| <b>Account Name:</b>                  | United Way of Northwest Alabama   |
| <b>United Way's Tax ID:</b>           | 63-0873878  |
| <b>UWNWAL's Contact:</b>              | Jennifer McNulty, President & CEO<br>(256) 764-5892 Ext 100 or <a href="mailto:ceo@uwshoals.org">ceo@uwshoals.org</a> |

To maintain a clear record of your gift, please send UWNWAL a copy of any letter of instruction you provide to your broker. Please ensure the gift is clearly identified. If no gift date is provided, the date the stock is received by the Broker will be used.

UWNWAL will send an acknowledgement letter to the donor after the stock is sold. The stock will be valued at the median market value on the recorded gift date.

**Thank you for your generous support.**