



Stock Instructions

UBS is the preferred account used by UWGC to receive and liquidate stock gifts. The account information is below:

Name of Receiving Institution:	UBS Financial Services
UBS Contact:	Linda McGann
Telephone No:	(216) 765-8131
Receiving Institution Account No:	NG 33717
DTC No:	0221
Account Title/Registration:	United Way Services
United Way Tax ID#	34-6516654
UWGC Contact:	Elaine Marquard
Telephone No:	(216) 436-2151
Email Address:	emarquard@unitedwaycleveland.org

To have a clear record of your gift, we request a copy of any letter of instructions which you may provide to your broker/client be copied to United Way so we have a clear record of the gift. Please make sure the gift date is clearly identified. If no gift date is provided, the date the stock is received by UBS will be used.

United Way will send an acknowledgement letter to the donor after the stock is sold. The stock is valued at the median market value using the gift date.

Thank you!