

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:	Tammie Bond
Telephone No:	(216) 292-1255
Receiving Institution Account No:	FY 13874
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 the gift, we request that a copy of any letter of instructions which you may provide to your broker/client also be copied to United Way of Greater Cleveland. Please make sure that the gift date is also clearly identified. If no gift date is provided, the date the stock is received by UBS will be used instead.

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

Thank you!