



Gifts of Stocks, Bonds, and Mutual Funds to the United Way of Lee County

- Bypass capital gains taxes.
- Give a large gift with less cost to you!

Call us for additional assistance.

1. **If share are held at your brokerage firm, trust department of financial institution:**
 - A. Call the United Way of Lee County at 239-433-7201 to pledge.
 - B. Notify your financial institution of the description and quantity of the transfer to United Way.
 - C. Securities should be transferred to " United Way of Lee County account **#81472146, DTC 0725 (Raymond James & Assoc., Inc.)**
The contact is Becky Pardue 239-936-6300
 - D. Please ask the financial institution to notify United Way of the expected gift as funds are transferred to our broker with no donor name listed.
 - E. The United Way will provide you with the documentation of your gift.

United Way of Lee County
7273 Concourse Drive
Fort Myers, FL 33908
Phone 239-433-7204
Stacey@UnitedWayLee.org
Fax 239-433-5692
Web Address www.UnitedWayLee.org
Federal Tax ID # 59-1005169

