



## 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 shares 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](http://www.UnitedWayLee.org)**  
**Federal Tax ID # 59-1005169**

