

Please send the following information to your broker. Due to broker privacy policies, your stock transfer may be anonymous.

To identify your donation, **please send a copy of this letter and/or provide the following information by mail, fax or email to:**

Greater Gallatin United Way
Attn: Danica Jamison
945 Technology Blvd., Ste. 101F, Bozeman, MT 59718 | phone 406.587.2194
fax 406.586.0996 | email: admin@greatergallatinunitedway.org

STOCK TRANSFER DONATION LETTER

Donor Name _____
Date

Dear _____:
Donor's Broker's Name

I wish to donate _____ shares of _____
Number Name of Security
held in my _____ account, # _____,
Brokerage Name Account Number

to Greater Gallatin United Way. Please transfer _____ shares to Greater Gallatin United Way Brokerage Account
Number
as follows (please check your choice):

- Northfork Financial, LLC, PO Box 965, Bozeman, MT 59771, Attn. Bill Stoddart, 406.579.0334
- Clearing Entity: Charles Schwab, DTC#: 0164 Code 40, Account #: 94137043

This donation represents my current pledge to Greater Gallatin United Way, EIN 81-0384820. Please forward my name with the stock transfer for gift verification purposes.

If you have any questions about this donation, please call or email me at _____ or
Phone Number

Email Address

Sincerely,

Donor Name

Donor Signature