



Donating Stock to United Way

Assign or transfer your stock securities to United Way of Johnson & Washington Counties.

Step 1: Send a letter to your broker to authorize the electronic transfer of stock as a contribution to the United Way of Johnson & Washington Counties. Include the following details in your letter: name of stock, number of shares, expected date of transfer, your mailing address and your work and home phone numbers.

Our brokerage information is as follows:

United Way Brokerage Acct.	DTC #	United Way Acct. #	Contact Name	Contact Info
Pershing LLC fbo United Way of Johnson & Washington Counties Cambridge Cashiering	0443	JEK114890	Alicia Mitros	(319) 358-7700 alicia.mitros@financialintegrators.com

Step 2:

Please send a copy of your letter to United Way of Johnson & Washington Counties at info@unitedwayjwc.org and to our broker Alicia Mitros at alicia.mitros@financialintegrators.com, or call us at 319-338-7823 to ensure your gift is properly acknowledged. For further questions, please contact Emma Barnum at Emma.Barnum@unitedwayjwc.org.

Step 3:

Once the stock is received, United Way of Johnson & Washington Counties will send you a confirmation letter that may be used for tax purposes.

Thank you for your support in creating a strong community for all.