



Share/Unit Transfer Form - Gifts of Publicly Traded Securities to  
United Way of York Region

In order to complete the transaction:

1. **Call Elizabeth McKeown, Leadership & Major Gifts Officer, UWYR at (905) 474-9974 x. 240 to receive account # to initiate transfer.**
2. **Complete this form to send to your broker and fax/e-mail a copy to Elizabeth McKeown at (905) 474-0051.**
3. **Shares/units should be transferred in-kind and are not to be liquidated.**

**To be completed by donor:**

Donor's Name: \_\_\_\_\_

Donor's Address: \_\_\_\_\_

Donor's E-mail: \_\_\_\_\_ Phone #: \_\_\_\_\_

Donor's Workplace (if applicable) \_\_\_\_\_

Name of Donor's Broker \_\_\_\_\_

Broker's Firm \_\_\_\_\_ Phone \_\_\_\_\_

Name of Security \_\_\_\_\_ No. of Shares/Units to Transfer \_\_\_\_\_

Approx. Value of Donation \_\_\_\_\_ Date of Transfer to United Way's Account \_\_\_\_\_

**Recognition:** If you donate \$1,000 or more to United Way, you are a Community Leadership donor.

United Way may publicly recognize my Community Leadership donation.

I would like my name to appear as: \_\_\_\_\_ **OR**

I do not wish to have my Community Leadership donation publicly recognized.

I understand that all donated securities are sold upon receipt. The net proceeds from our sale of your donated securities will be the amount of your gift. This value may be higher or lower than the value of your charitable gift receipt, which amount is determined by the closing price on the day that United Way of York Region receives the shares into our account.

\_\_\_\_\_  
Donor's Signature

\_\_\_\_\_  
2<sup>nd</sup> Donor's Signature if jointly held

\_\_\_\_\_  
Date