

DONOR LETTER OF SECURITIES TRANSFER

Orange County United Way provides this form to assist the donor in instructing his/her broker to transfer securities as a donation to Orange County United Way.

PLEASE FORWARD DIRECTLY TO YOUR BROKER TO INITIATE SALE WITH A COPY TO ORANGE COUNTY UNITED WAY.

To: _____
 Broker name

 Brokerage house

 Address

 City, State, Zip

R.e.: _____
 Account # Security (ies)

 #of shares Estimated value

 Anticipated date of transfer

Please accept this letter as your authorization to deliver the securities from my account, referenced above, to the account of Orange County United Way per the following instructions:

Attn: Joseph Mandichak
 LPLFinancial
 25255 Cabot Road, Suite 209
 Laguna Hills, CA 92653

Telephone: 949.583.1075
 Fax: 949.583.1085

For DTC of security:
 LPLFinancial
 DTC #0075

For further credit:
 Orange County United Way
 Acct #48055737

 Grantor (please print name) Address

 Grantor (signature) City, State, Zip

 Social security number Phone number

 Date Email address

NOTE: Orange County United Way does not control market conditions, timing, or value of proceeds pertaining to the above referenced securities. The net amount of the transaction after commissions/fees will be considered your contribution to the Orange County United Way. Orange County United Way does not claim, recognize, or receive benefit from any fees that relate to, or result from, this security transaction. The impact to a donor's tax deduction, if any, is not based on the net proceeds received by Orange County United Way or the estimated value of the donation identified above. PLEASE CONSULT WITH YOUR TAX ADVISOR.

Please send a copy of this form to: Emilee Tello
 Telephone: 949.263.6153
 Fax: 949.724.4349
 Email: emileet@unitedwayoc.org

