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 LPL Financial
30131 Town Center Drive, Suite 100
Laguna Niguel, CA 92677

Telephone: 949.583.1075 Fax: 949.583.1085

For DTC of security:
LPL Financial
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

United Way
Orange County United Way

Ref 052118