

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 TRANSFER WITH A COPY TO ORANGE COUNTY UNITED WAY

_____ Broker Name	_____ Account #
_____ Brokerage House	_____ # of shares
_____ Address	_____ Anticipated date of transfer
_____ City, State, Zip	_____ Security (ies)
	_____ Estimated value

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: Nathan Brown
 Trilogy Financial
 2601 Main Street, #100
 Irvine, CA 92641
nathan.brown@trilogyfs.com
 Phone: 951-271-4122

For: LPL Financial
 DTC #0075

For further credit:
 Orange County United Way
 Acct #48055737

Nathan is happy to assist you with any questions.

_____ Grantor (please print name)	_____ Address
_____ Grantor (signature)	_____ City, State, Zip
_____ Social Security number	_____ Phone number
_____ Date	_____ Email address

Please send a copy of this form to:
 Emilee Tello emileet@unitedwayoc.org Phone: 949-263-6153 Fax: 949-271-8053

Note: Orange County United Way (OCUW) 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 OCUW. OCUW 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 OCUW or the estimated value of the donation identified above. PLEASE CONSULT WITH YOUR TAX ADVISOR.

Orange County United Way - 18012 Mitchell South, Irvine, CA 92614 - 949-660-7600

