

# TAKE STOCK IN UNITED WAY OF LANCASTER COUNTY



You can realize tax savings in multiple ways by contributing stock as a gift to United Way:

1. **Charitable Deduction**-Federal law permits taxpayers who itemize to deduct the current value of charitable contributions from their adjusted gross income.
2. **Avoidance Capital Gains Tax**-Stock contributors may have no capital gains tax liability on the difference between what they paid for the donated stock and its current fair market value (FMV).

## HOW TO GIVE

If you hold securities in “street name”, that is, you do not have physical possession of the stock certificate please notify your broker to initiate “broker-to-broker” transfer (see page 2 for required information). This will transfer the donated stock from your brokerage account to United Way’s brokerage account, at which time United Way will liquidate the donated stock. Call United Way at 717-824-8127 for specific instructions regarding a stock transfer.

## VALUATION FOR TAX PURPOSES AND DATE OF GIFT

1. The effective date of the gift is the day the stock is transferred to the United Way of Lancaster County (whether directly or to its broker).
2. The \$ value of the donated gift for income tax purposes is the mean of the high and low selling prices on that effective date.
3. Your gift will be acknowledged by UWLC for tax purposes, noting the effective date and value of donation.

## BROKER/ACCOUNT INFORMATION

1. **United Way Broker:** Morgan Stanley.  
Contact: Steve Kepchar (717-519-3224).
2. **Broker DTC Number:** #0015
3. **Account Name:** United Way Campaign of LancCo.
4. **Account Number:** 613041167
5. **United Way Fed Ein:** 23-1352093.

## FOR QUESTIONS OR ADDITIONAL INFORMATION

Please call 717-824-8127 or email [DonorRelations@UWLanc.org](mailto:DonorRelations@UWLanc.org)