

Gifting Stocks, Bonds, and Mutual Funds to the United Way of Lee County

- Bypass capital gains taxes.**
- Give a large gift with less cost to you!**

Call us for additional assistance.

- 1. If share are held at your brokerage firm, trust department of financial institution:**
 - Call the United Way of Lee County at 239-433-7201 to pledge.
 - Notify your financial institution of the description and quantity of the transfer to United Way.
 - Securities should be transferred to " United Way of Lee County account **#81472146, DTC 0725 (Raymond James & Assoc., Inc.)**
The contact is Becky Pardue 239-936-6300
 - Please ask the financial institution to notify United Way of the expected gift as funds are transferred to our broker with no donor name listed.
 - The United Way will provide you with the documentation of your gift.

**United Way of Lee County
7273 Concourse Drive
Fort Myers, FL 33908
Phone 239-433-7201
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Fax 239-433-5692
Web Address www.UnitedWayLee.org
Federal Tax ID # **59-1005169****