

SECURITIES

How to make a gift of stocks and bonds

Thank you in advance for investing in our community through the United Way of Cass-Clay. Your gift will make a lasting impact on our community for years to come. Thank you for your generous support!

Please reach out to Dan Klug, Major Gifts Lead, if you have any questions.

Electronic Transfer

If you hold securities in "street name," (you do not have physical possession of the stock certificate) please notify your broker to initiate a "broker to broker" transfer. Ask your broker to donate the stock to United Way of Cass-Clay using the information below.

Broker: Wells Fargo Clearing Services, LLC
DTC #: 0141
Account Name: United Way of Cass-Clay
Federal Tax ID: 41-0810008

Certified Mail

If you hold securities in certificate form, you will need to mail two envelopes separately to complete your gift. In the first envelope, place the unsigned stock certificate(s). In the other envelope, include a signed stock power for each certificate. You may obtain this power from your broker or bank. Please remember to use certified mail.

Our Broker Contact Information

Timothy Graveline, Matthew Watson, Lawrence Wittman
OneWealth Financial Wells Fargo Advisors Financial Network
406 Main Ave Ste 250
Fargo, ND 58103
701-353-0413, 701-353-0414, 701-353-0415
tgraveline@wfafinet.com, mwatson@wfafinet.com, lwittman@wfafinet.com

*It is important that the securities be transferred to United Way's account prior to being sold in order to avoid capital gains taxation.

More on Gifts of Stocks and Bonds

There are special rules for valuing a gift of stock. The value of a charitable gift of stock is determined by taking the mean between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. OneWealth Financial is a separate entity from WFAFN.