

Steps to donating stock to the Fellowship

The Fellowship utilizes the UUA's Umbrella Giving Program to process stock donations. The stock is sold immediately upon receipt and all the proceeds are sent directly to the Fellowship. Please follow these simple steps to donate stock.

1. Complete the stock gift notification form

CLICK HERE to go to the form, or paste into your browser:
<https://www.uua.org/giving/make-gift/giftsstock/notification-form>

Make sure under "Gift Purpose" that you select "UU Congregation/Fellowship" and then type in "UU Fellowship of Winston-Salem, NC." Be sure to click "submit."

2. Arrange for gift transfer

Give these instructions to your transfer agent, broker or investment company:

Deliver the gifted stock electronically to US Bank N.A.

Into Account: 6728029094

Account Name: The Unitarian Universalist Assn. Gifted Securities Account

Tax ID: 04-2103733

DTC: 2803

Receiving agent is:

Adrienne Lindsey

Investment Services Account Manager

US Bank Wealth Management

Direct: (215) 761-9335

Fax: (215) 761-9414

Email: adrienne.lindsey@usbank.com

3. Wait for acknowledgement

The UUA will acknowledge your gift and send you a tax receipt once the securities are sold. This could take 2-7 business days for publicly held stock. It takes much longer for mutual funds or privately held stock.

If you have any questions or problems throughout the process, email giftinfo@uua.org or call Tom Klein, UUA Gift Processing Manager at (617) 948-4286.



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UNIVERSALIST
FELLOWSHIP
of Winston-Salem

Full details on UUA's Umbrella Giving Program may be found at [uua.org/giving/make-gift/giftsstock](https://www.uua.org/giving/make-gift/giftsstock)