Procedure for Donating Stock to the United Way of Pioneer Valley

If Securities are held in the hands of a stock broker:

Instruct your stock broker as to quantity and description of the shares you want transferred to the United Way of Pioneer Valley.

Provide your stockbroker with the following information regarding the United Way of Pioneer Valley:

A. Account Name: United Way of Pioneer Valley
B. Brokerage Firm: UBS Financial Services
C. Financial Consultant: Patrick Donnelly
D. Phone Number: 413-785-4900
E. DTC Number: 0221
F. Account Number: VZ 45672 DM
G. Tax ID Number: 04-2152680

Your broker will then take the necessary steps in order to transfer the stocks.

Please ask your broker to contact United Way of Pioneer Valley with the following information:

(Donor’s name) has just made a gift of (# of shares) of (name of stocks) effective (date of transfer) to United Way of Pioneer Valley account at UBS Financial Services. You should call Patrick Donnelly to inform him of the gift’s transfer; do not rely on the donor’s broker to do this. Mr. Donnelly will notify us of the gift through a letter including the date of transfer and mean value per share.

If securities are held by you, you may hand deliver or mail the certificates to:

Patrick Donnelly
UBS Financial Services, Inc.
1 Monarch Place, Suite 1400
Springfield, MA 01144

A stock power and security release form must be signed and mailed in a separate envelope. These forms may be obtained at the office of Patrick Donnelly.

If you need further information or if you need assistance with either of these procedures, please contact:

Raymond Berry
Sr. Vice President Finance & Administration
United Way of Pioneer Valley
1441 Main Street, Suite 147
Springfield, MA 01103

Patrick Donnelly
UBS Financial Services, Inc.
1 Monarch Place, Suite 1400
Springfield, MA 01144