

## Stock Transfer Information

Donors can make a charitable gift of stock by transferring shares to United Way of Rhode Island. Listed below is the contact and account information for United Way and its broker.

***A letter of instruction stating the donor's intentions should be emailed to either Elsa R. Ramage ([elsa.r.ramage@ubs.com](mailto:elsa.r.ramage@ubs.com)) or Douglas Bennet ([douglas.bennet@ubs.com](mailto:douglas.bennet@ubs.com)) at UBS Financial Services with a copy also sent to Donna Kane ([donna.kane@unitedwayri.org](mailto:donna.kane@unitedwayri.org)) at United Way of Rhode Island.***

**BROKER:** UBS Financial Services Inc.  
500 Exchange Street (Suite #1210), Providence RI 02903

**ACCOUNT NUMBER:** RH 07421  
DTC: 0221

**INVESTMENT ACCOUNT CONTACT:** Douglas C. Bennet  
[douglas.bennet@ubs.com](mailto:douglas.bennet@ubs.com)  
Telephone: 401-455-6776  
Fax: 855-870-1376

**ACCOUNT NAME:** United Way of Rhode Island, Inc.  
50 Valley Street, Providence RI 02909

**UNITED WAY'S TAX ID NUMBER:** 05-0276059

**UNITED WAY CONTACTS:** Anthony Tucciarone, Accounting Manager      Donna Kane, Controller  
[anthony.tucciarone@unitedwayri.org](mailto:anthony.tucciarone@unitedwayri.org)      [donna.kane@unitedwayri.org](mailto:donna.kane@unitedwayri.org)  
401-444-0610      401-444-0682

**GIFT VALUE CALCULATION:** United Way of Rhode Island values gifts of stock at the mean market value on the day the transfer of ownership takes place.  
A receipt will be sent to the donor within two weeks of confirmation of donation.