

50 Valley Street  
Providence, RI 02909  
tel 401.444.0600  
fax 401.444.0635  
www.LIVEUNITEDri.org



## Stock Transfer Information

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

*A letter of instruction should be faxed to Christine Hall at UBS Financial Services stating the donor's intentions and a copy to Mary Benvenuto and Shawn Brelsford at United Way.*

**Broker:** UBS Financial Services Inc.  
500 Exchange Street (Fleet #1210)  
Providence, RI 02903  
Fax: (855) 870-1376

**Account Number:** RH 07421  
**DTC:** 221

**Investment Account Contact:** Douglas C. Bennet  
Telephone: (401) 455-6776  
Fax: (855) 870-1376

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

**Tax Identification Number:** 05-0276059

**United Way Contacts:** Shawn Brelsford  
Program Manager, Grant Accounting  
Telephone: (401) 444-0610  
Fax: (401) 444-0635  
E-mail: [shawn.brelsford@uwri.org](mailto:shawn.brelsford@uwri.org)

**Gift Valuation Information:** 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 the donation.

**GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED.™**