

United Way of Massachusetts Bay, Inc. d/b/a United Way of Massachusetts Bay and Merrimack Valley  
EIN # 04-2382233  
51 Sleeper Street  
Boston, MA 02210

**SECURITIES TRANSFER INSTRUCTIONS**

Below are the specific instructions in order to process your securities transaction:

1. **Complete the following form. When you are finished with the form, send a copy to Barbara Alexander (Contact information below):**

Name (Last, Middle, First): \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_

State, Zip Code: \_\_\_\_\_

Gift information:

Description: \_\_\_\_\_

# of shares (if stock): \_\_\_\_\_

Dollar value: \_\_\_\_\_

\_\_\_\_\_ Check here if you do *not* want to be recognized.

Signature (if faxing): \_\_\_\_\_

2. **Contact your broker**, via e-mail, phone or fax, with instructions to transfer the securities you have selected. Please ask your broker to keep your name attached to the securities transfer so we will be able to identify it when the proceeds are received.

3. **Transfer the securities** to our account (**JZJ210743**) for **UNITED WAY OF MASSACHUSETTS BAY, INC.** at

**Canaccord/Genuity**  
**Attn: Martin Fennelly**  
**99 High Street, 12<sup>th</sup> Floor**  
**Boston, MA. 02110**

You will also need to include their **DTC# 0443**.

The **contact person** there is Martin Fennelly  
Direct dial number is **617-371-3731**

FAX number is **617-371-3796**.

Our Tax ID number is: 04-2382233

You will be notified as soon as the securities have been processed and credited to your account. It normally takes 7 to 10 business days from the time the broker receives the request, to the time we receive the check for the sale of the securities.

Should you have any questions please contact:

Barbara Alexander  
Accounts Receivable Coordinator  
United Way of Massachusetts Bay, Inc.  
P.O. Box 51381  
Boston, MA 02205-1381  
Direct dial: 617.624.8225  
Fax:617.624.9114  
e-mail: **balexander@supportunitedway.org**

For **Millennium Fund** you will need to contact Hope Groves at The Boston Foundation. Her direct dial number is 617-338-2661 and her email is hcg@tbf.com.

Thank you for supporting United Way of Massachusetts Bay and Merrimack Valley.