

## Stock Donation Instructions

To donate stock, please follow the instructions below. You should also contact your stock broker, tax advisor, or financial consultant for more details about making your donation in the form of stock.

**Step 1.** Complete the pledge process and indicate “stock” as your giving method. Also include the approximate stock cash value.

**Step 2.** Send the following two items to YOUR BROKER or financial consultant: 1) a letter authorizing the TRANSFER of stock as a charitable contribution to your designated agency, and 2) a United Way Contribution Stock Transfer Verification Form. Please complete Section I of the Verification Form before sending to your broker. Once the stock transfer is complete your broker **must** complete Section II of the Verification Form and return it to Pfizer. Completed Verification form must be received in order for the match to be completed. A copy of the form and a sample broker letter has been provided.

If you are donating stock to more than one agency, send a separate letter and Verification Form to your stock broker for each agency receiving stock.

Include the following details in the letter to your broker:

- Expected date of transfer of shares
- Number of shares
- Name of stock
- Your mailing address
- Daytime phone number(s)
- Name of charitable agency receiving shares
- Agency contact information

**Step 3.** Send a copy of the broker letter to your designated agency for acknowledgement and tax purposes. At this point, you have completed your portion of the stock donation process.

Upon receipt of your letter, your broker must contact each designated agency to obtain the agency's brokerage account information.

- Agency Account Name
- Broker
- Account number
- Federal Tax ID number
- DTC #

We have provided the stock transfer information for key United Way chapters.

# PFIZER UNITED WAY CAMPAIGN STOCK TRANSFER VERIFICATION FORM

**SECTION I (to be completed by retiree donor)**

Donor Name: \_\_\_\_\_

Donation of: \_\_\_\_\_ Pfizer Common Stock  
(check one)  
\_\_\_\_\_ Other Stock (Identify)

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**SECTION II (to be completed by stock transfer agent - Private Broker / Brokerage Firm)**

Total Number of Shares Transferred: \_\_\_\_\_

Total Dollar Value of Transfer: \$ \_\_\_\_\_

Date Transfer Completed: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Verification Signature: \_\_\_\_\_

Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Please return completed form to:**

**Pfizer United Way Campaign Processing  
Center  
P.O. Box 2072  
Princeton, NJ 08543  
Fax: 609-799-8019**

**Note:** Form must be returned in order to receive a match.

## Sample Stock Donation Letter

*<insert employee name>*  
*<address>*  
*<city/state/zip>*  
*<daytime phone>*  
*<email address>*  
  
*<today's date>*

*<insert broker name>*  
*<mailing address>*  
*<city/state/zip>*

Dear *<broker contact name>*:

I would like to make a charitable donation to the designated agency named below through the Pfizer United Way campaign. Please complete this transaction before/on *<insert date>*.

I would like to donate *<insert # of shares>* shares of common stock in *<insert company name>*. The current value per share is \$*<insert average price as of today's date>*. The approximate total value of my donation is *<insert dollar amount (average price value X # of shares)>*.

Information and instructions on how to access the agency's account can be obtained directly from the agency. Here is the agency's contact information:

*<insert agency name>*  
*<address>*  
*<city/state/zip>*  
*<phone>*  
*<fax>*  
*<email address>*

Upon receipt of this request, please contact the agency named above to obtain their brokerage account information needed to transfer the stock. Thank you for your help.

Sincerely,  
*<insert employee name>*

cc: *<agency name>*  
*<address>*  
*<city/state/zip>*