

TRIDENT UNITED WAY

STOCK TRANSFER PROCEDURES

1. If shares are held at your Brokerage House, Trust Department, or Financial Institution:

- Please contact your Relationship Manager or Terri Crocker at 843.740.7740 in Resource Development at Trident United Way about the gift.
- Notify your financial advisor of the name and quantity to transfer to Trident United Way.
- Ask your advisor to transfer the share to DTC Clearing #0955 (Bank of America) for credit to A/C# 07-16-002-1584747 in the account name of IM Trident U Way Sec Gift Fund, and include your name as part of the gift.
- **Please ask your advisor to notify Trident United Way that the gift is coming.**

2. If shares are held by you, please call Trident United Way at 843.740.7740 and ask for Terri Crocker.

PO Box 63305, Charleston, SC 29419-3305

Phone 843.740.9000 - FAX 843.566.7193

www.tuw.org