

**INSTRUCTIONS TO
TRANSFER SECURITIES
TO United Way of Northern New Mexico**

To transfer securities:

Please instruct your current broker / custodian to "DTC" your donation to the United Way of Northern New Mexico's account at Charles Schwab. Your broker will most likely require you to provide them with a written "LOA" = Letter of Authorization which indicates the name of the security, the number of shares and includes the following delivery instructions:

United Way of Northern New Mexico
Schwab Account # 5087-6458
DTC Clearing #0164, Code 40

Please Note: Due to privacy requirements, we are unable to access donor information through the financial agencies that process your transfer. Please provide us with the following information so that we may properly acknowledge and receipt your gift:

Donor Name (s) – first and last
Donor address/phone
Name of stock and number of shares transferring

Information should be sent to:

Kristy Ortega at United Way of Northern New Mexico:

kristy@unitedwaynm.org

505-662-0800

If you need additional help with the delivery process you can contact Eric Loucks at LANB

ericl@lanb.com

505-661-2250