

# HOW TO CONTRIBUTE STOCK TO UNITED WAY



Greater Milwaukee  
& Waukesha County

## 1 If you do not have physical possession of the stock certificate:

- Direct broker or agent to transfer shares from your account into the “United Way of Greater Milwaukee & Waukesha County” account at Robert W. Baird, account #8505-1001, DTC #0547.
- Please notify our Senior Accountant Chelsea Omari at 414.263.8144 or [comari@UnitedWayGMWC.org](mailto:comari@UnitedWayGMWC.org) or Abbey Dallman at Robert W. Baird, 414.765.7316 or [adallman@rwbaird.com](mailto:adallman@rwbaird.com) when transfer has been completed.

OR

- Instruct your current broker to have a physical certificate issued in the name of “United Way of Greater Milwaukee & Waukesha County.”
- Indicate the exact number of shares you wish to contribute and send the certificate to:

Robert W. Baird Attn:  
Abbey Dallman  
777 E. Wisconsin Ave.  
Milwaukee, WI 53202

- Please notify our Senior Accountant Chelsea Omari at 414.263.8144 or [comari@UnitedWayGMWC.org](mailto:comari@UnitedWayGMWC.org) when transfer has been completed.

## 2 If you have physical possession of the stock certificate:

- Sign the back of the certificate where indicated, on the lower right side, exactly as it is registered to you.
- On the line in front of the word “attorney,” write “Robert W. Baird” to render the certificate non-negotiable.
- Deliver or send the stock certificate with a letter authorizing the shares to be deposited into the “United Way of Greater Milwaukee & Waukesha County” account as a charitable contribution to:

Robert W. Baird  
Attn: Abbey Dallman  
777 E. Wisconsin Ave.  
Milwaukee, WI 53202

- Please notify our Senior Accountant Chelsea Omari, 414.263.8144, [comari@UnitedWayGMWC.org](mailto:comari@UnitedWayGMWC.org) when transfer is completed.

Contact Abbey Dallman with questions on stock certificates, powers, additional paperwork, and notification of stock transfers at 414.765.7316 or [adallman@rwbaird.com](mailto:adallman@rwbaird.com).