



How to Make a Gift of Stock to United Way of Addison County

DTC Eligible Securities

Client Account Name: United Way of Addison County

Client Schwab Account Number: 5010 1290

Delivery to DTC Clearing Number: 0164 Code 40

Securities Delivered in Certificate Format:

Client Account Name: United Way of Addison County

Client Schwab Account Number: 5010 1290

Charles Schwab & Co., Inc. Attn: Transfer of Accounts

PO Box 52013

Phoenix, AZ 85072

Checks:

Send to address below for deposit:

Rock Point Advisors

PO Box 700

Burlington, VT 05402

Wire Money to Schwab Account:

Citibank NA, 111 Wall Street, New York, NY 10043

ABA#: 021000089

FBO: Charles Schwab & Co., Inc.

Client Account Name: United Way of Addison County

Client Schwab Account Number: 5010 1290

*For questions, please contact Steve Williams, Accounting Manager
(802)-388-7189 * steve@unitedwayaddisoncounty.org*