

How to Make a Stock Donation to USO of Metropolitan Washington

Thank you for your interest in donating your stock to USO of Metropolitan Washington. We appreciate your generosity. There are two options you can select from to donate your stock. Please select the option that you are most comfortable with and follow the steps below to transfer stock donations.

Option #1

- ★ Complete the form attached, known as a letter of authorization (LOA) to the firm that currently houses your stock.
- ★ Contact your firm to identify their requirements for a stock transfer.
- ★ Transfer instructions to USO-Metro are on the LOA form
- ★ USO-Metro cannot place the account number on this form, please contact either Amberly Seibert-Jackson who is with UBS Financial Services, which houses our account for stock transfers or Cheryl Hall at USO-Metro:

Amberly Seibert-Jackson
UBS Financial Services, Inc.
8044 Montgomery Road Suite 200W
Cincinnati, OH 45236
Phone: (513) 792-2439
Fax: (513) 792-4206
Email: amberly.seibert-jackson@ubs.com

Cheryl Hall, COO
USO of Metropolitan Washington, Inc.
228 McNair Road, Building 405
Mailing Address: PO Box 1710
Ft. Myer, VA 22211-1101
Direct: (703) 696-7800
Fax: (703) 696-2550
Email: Cheryl@usometro.org

Option #2

** This option may take additional time because there are some forms for USO-Metro to work with.

- ★ Instruct your firm telling them to have a stock certificate produced for the number of shares you wish to donate, registered to the USO of Metropolitan Washington.
- ★ Have the certificate mailed to Cheryl Hall at USO of Metropolitan Washington, or to Amberly Siebert Jackson at UBS.

Please do not hesitate to contact us if you should have any questions. Please be sure to include your:

- ★ Full Name
- ★ Address
- ★ City, State Zip
- ★ Home Phone
- ★ Work Phone
- ★ Email Address

Brokers Name
Brokerage Firm Name
Street Address
City, State, Zip Code
Phone Number

Dear _____:

Please complete the gift transfer as noted below from account # _____
in the name of _____.

Stock Symbol: _____

Stock Name: _____

Number of Shares to Transfer: _____

Transfer to Firm Name: UBS Financial Services, Inc

Transfer to DTC Number: 0221

Account Number: CE- _____ -76

Account Name: USO of Metro Washington, Inc

Sincerely,

Account Owner: _____ Date _____

Account Owner: _____ Date _____