

2024

EXXONMOBIL UNITED WAY CAMPAIGN
INSTRUCTIONS FOR DONATING STOCK

Contributors wishing to donate stock in lieu of a cash gift or payroll deduction pledge may use the following procedures to make their contribution. To be included in this year's campaign, pledge cards must be submitted by March 15, 2025 and all stock transfers must be completed by December 31, 2025. *Note that donations are tax deductible in the year that transfers are processed*

- Any stock traded on the New York Stock Exchange, the American Stock Exchange, or over-the-counter may be contributed to the United Way.
- It is most tax-efficient to contribute appreciated stock, because the donor does not realize any capital gain on the donated securities.

STOCK HELD IN ANY BROKERAGE ACCOUNT

- To contribute stock held in your account with Morgan Stanley or **any other brokerage account**, the attached "Stock Contribution Transfer Form" **must** be completed.
- This form can be used for ExxonMobil stock or shares of any other corporation.
- **To execute the stock transfer, please submit the form directly to your broker/advisor.** If you have indicated a future transfer date (i.e. several weeks/months from the current date) on your pledge card, the form should be submitted to your broker/advisor near the desired transfer date.
- **For proper acknowledgement of your donation**, please also send a copy to Morgan Stanley at XOM@MORGANSTANLEY.COM or via fax to 315-849-1619.
- Questions or issues? Contact Gwen Garibaldi at Morgan Stanley, 973-993-5263.

ACKNOWLEDGMENT

Shortly after receipt of a security gift, the United Way will acknowledge the contribution.

If you have general questions or concerns, contact April Bradley at 346-566-9291.