



Wisconsin Historical  
FOUNDATION

## Stock Donation Instructions

Updated 6/5/17

### **Step 1**

Share the following information with your stock broker for electronic transfer (DTC-Eligible or Fed-Eligible Securities):

**Account Name:** WHF Stock Gift Account

**Account Type:** Stock Gift Account

**Account #:** ACY-288924

**ACATS/DTCC Participation #:** Depository Trust Company - #0443

**Financial Institution (Receiving Firm):** Pershing, LLC  
First Business Bank  
401 Charmany Drive  
Madison, WI 53719

**Bank Contact:** Richard Thompson  
Phone: 608-232-5768  
Email: [rthompson@firstbusiness.com](mailto:rthompson@firstbusiness.com)

### **Step 2**

Inform us of your intention to donate! Many stock gifts do not include the names of our donors or your intentions for the donated funds. Please call or email Lauren McCracken at 608-261-9588 or [lauren.mccracken@wisconsinhistory.org](mailto:lauren.mccracken@wisconsinhistory.org) with your name, the stock or security name, the number of shares you intend to transfer, and any other helpful information or questions.

*If you would like to donate physical stock or bond issues, or any foreign securities, please contact Lauren McCracken via email or phone at [lauren.mccracken@wisconsinhistory.org](mailto:lauren.mccracken@wisconsinhistory.org) or 608-261-9588.*

Supporting the Wisconsin Historical Society Since 1954

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