



**Wisconsin Historical  
FOUNDATION**

**Wisconsin Historical Foundation Stock Donation Instructions**

*Updated 7/25/2017*

**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 name of the donor or your intention for the donated funds. **Please contact Claudia Martinez, Finance & Office Manager, at (608) 261-9588 or [claudia.martinez@wisconsinhistory.org](mailto:claudia.martinez@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. Claudia can also help if you have questions about your donation, or you would like to donate physical stock or bond issues, or any foreign securities.

*If Claudia is unavailable, please contact Laura Ingersoll, Director of Annual Giving, via email or phone at [laura.ingersoll@wisconsinhistory.org](mailto:laura.ingersoll@wisconsinhistory.org) or (608) 264-6543.*

**Supporting the Wisconsin Historical Society Since 1954**

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