Wisconsin Historical Foundation Stock Donation Instructions
Updated 11/28/2018

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 #:** 2917-7374

**ACATS/DTCC Participation #:** Depository Trust Company - #0075

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

**Bank Contact:**
Gary Fossum
Phone: 608-232-5990
Email: gfossum@firstbusinessinvestment.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 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 and you need immediate assistance, please contact Hannah Hankins, Director of Annual Giving, via email or phone at hannah.hankins@wisconsinhistory.org or (608) 264-6020.*