



**Wisconsin Historical
FOUNDATION**

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.

Supporting the Wisconsin Historical Society Since 1954

816 State Street P.O. Box 260050 Madison, Wisconsin 53726-0050 tel. 608.261.9364 fax 608.264.6545