

## STOCK DONATIONS

To donate stock to the Community Foundation of North Central Wisconsin, provide your investment advisor with the following stock delivery instructions through our DTC eligible partner WoodTrust Bank:

DTC Participant Name: Reliance Trust Co/FIS  
FBO WoodTrust #74-2107-01-4

DTC Participant Number: 5409

For Further Credit to:

Community Foundation of North Central Wisconsin (12000-1)  
Account #: JH60-0055-01-6

Contact Information: WoodTrust Bank  
WoodTrust Asset Management Division  
181 2<sup>nd</sup> Street South  
PO Box 8000  
Wisconsin Rapids, WI 54494  
715-423-6800 / 715-301-1625 Melissa Lemmer

DTC/FIS Participant Email contact: [WOS\\_MKE\\_Booking@fisglobal.com](mailto:WOS_MKE_Booking@fisglobal.com)

**IMPORTANT:** Please complete and return the attached form to Pam Eckmann, VP of Finance and Operations, at the Community Foundation of NCW to ensure that the donation gets posted to the proper fund.



Phelps Area Community Foundation is an affiliate of the Community Foundation of North Central Wisconsin, Inc.

MEMO TO: Community Foundation of North Central Wisconsin  
EMAIL: pam@cfoncw.org  
PHONE: (715) 598-5991 (Pam)

THE FOLLOWING INDIVIDUAL(S) WILL BE MAKING A GIFT OF SECURITIES:

DONOR:  
NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

FUND: \_\_\_\_\_

PHONE: \_\_\_\_\_

NAME OF SECURITY: \_\_\_\_\_ QTY \_\_\_\_\_ shares

NAME OF SECURITY: \_\_\_\_\_ QTY \_\_\_\_\_ shares

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DELIVERING BROKER: \_\_\_\_\_

BROKER CONTACT:

NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_

PLEASE NOTE ANY RESTRICTIONS ON GIFTS BELOW: