



## Stock Gift Transfer Instructions

We are delighted that you want to make a gift of appreciated stock to 1000 Friends of Wisconsin. A gift of stock provides significant benefits, including an immediate charitable deduction for the full market value of the stock and avoidance of capital gains taxes that would normally be due upon sale. Any long-term appreciated securities with unrealized gains (meaning they were purchased over a year ago, and have a current value greater than their original cost) may be donated and a tax deduction taken for *the full fair market value of the securities* — up to 30% of the donor's adjusted gross income.

To complete your gift, please follow the instructions below.

### Transfer stock to the 1000 Friends of Wisconsin account:

Broker: Wells Fargo Advisors

Account number: 5236-7927

DTC number: 0141

1000 Friends of Wisconsin tax identification number: 39-1857262

### Contact us with the following information to identify your gift:

Donor name:

Broker:

Broker contact info:

Name of company whose shares you are donating:

Number of shares:

Transfer date:

### How to contact us:

Trevor Roark [trevor@1kfriends.org](mailto:trevor@1kfriends.org)

Phone: 608.259.1000

1000 Friends of Wisconsin

820 W. Wingra Drive #259704

Madison, WI 53725

Once we receive notification of the successful transfer of your stock gift, we will send an acknowledgement of the gift for your tax purposes.

*We are so grateful for your gift, and for your support of 1000 Friends of Wisconsin.*