



## Donation of Securities Form

Thank you for your interest in donating securities to the Wisconsin Chamber Orchestra (WCO). Please fill out the information below:

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Name and Type of Securities (ex: IBM common stock)      # of Shares      Date of Transfer

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Donor's Name

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Broker's Name

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Donor's Street Address

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Broker's Company

-----  
Donor's City/State/ZIP Code

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Broker's Phone Number

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Donor's Phone Number (Will only be used if a question arises or a problem occurs in the donation process)

The WCO's **broker contact information** is:

Merrill Lynch (Attn: Elizabeth Erker Owens)  
7676 Forsyth Blvd Fl 25  
Clayton, MO 63105

The WCO's **account number** with Merrill Lynch is 683-03623.

For electronic transfers, our Depository Trust Company (**DTC**) number is **8862**.  
**This is the most secure and cost-effective way to process your gift.**

The WCO's **tax identification number (FEIN)** is **39-6078526**.



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After the WCO receives this form and our broker confirms the donation of securities, the WCO Development office will issue an official acknowledgment letter to the donor. This letter will indicate the number and type of shares received and the date the stock was converted into a gift (the day when record ownership of stock was transferred to the WCO or the stock was unconditionally delivered to the WCO).

Stock information can be mailed to the Wisconsin Chamber Orchestra, ATTN: Elliott Valentine, 321 E. Main Street, Madison, WI 53703, or emailed to [elliottvalentine@wcoconcerts.org](mailto:elliottvalentine@wcoconcerts.org).

All contributions are tax-deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as soon as possible. For tax purposes, the value of the stock will be an average of the high and low prices on the date of the gift. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

**Please contact Elliott Valentine, Director of Development with the WCO, at 608.257.0638 x105 or [elliottvalentine@wcoconcerts.org](mailto:elliottvalentine@wcoconcerts.org) with any questions or feedback. Thank you!**