



### **ELECTRONIC TRANSFER OF STOCK**

Thank you for your recent inquiry about gifts of stock to the Wisconsin Dental Association Foundation, Inc. Making a gift to the WDA Foundation is a relatively simple process, and is very much appreciated.

Please instruct your broker to electronically transfer the stock to the WDA Foundation's account at Associated Investment Services.

Your broker will need the following information to complete the transfer:

Broker: Associated Investment Services  
Operations  
433 Main Street, 5<sup>th</sup> Floor  
Green Bay, WI 54301

Account Access: 1-800-595-7722, option 3 (Customer Service representative)

DTC Number: 0226

WDA Foundation Account Number: DCV006655

Beneficiary: The Wisconsin Dental Association Foundation, Inc.

WDA Foundation Tax ID number: 39-0965289

After you instruct your broker to make the stock transfer, please write, e-mail or call us to let us know of the gift. When securities are transferred electronically, the donor's name is not always included in the transfer information. By contacting us about the give, we will be able to properly match the stock that we received with your gift record.

Please provide the following information:

- Name of stock transferred
- Number of shares
- Brokerage firm transferring stock
- Approximate date of the transfer
- If you would like the gift used for a specific program or if it should be considered unrestricted funding to be used where the need is the greatest

For additional information, please contact:

Victoria M. Bohman

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