



The Eau Claire Community Foundation is pleased to be of assistance in carrying out your charitable goals through a gift of publicly traded stock. To ensure that your gift is promptly and properly administered, please contact us *prior to transferring the shares* to let us know the stock name and number of shares to be transferred.

Please provide the following information to your broker so that he or she may direct your thoughtful gift to the Community Foundation's account at Orgel Wealth Management:

### STOCK DELIVERY INSTRUCTIONS:

Firm Name:	Pershing, LLC
	Tax ID: 13-2741729
DTC Number:	0443
Account Name:	Eau Claire Community Foundation
Account Number:	Q28-122762

### FOR ASSISTANCE CONTACT:

Dee Dee Bendriss / Orgel Wealth Management  
Phone: 715-858-7746/ Email: [deedee.bendriss@orgelwealth.com](mailto:deedee.bendriss@orgelwealth.com)

It is the Community Foundation's policy to sell all shares upon receipt. The sale proceeds will be allocated to the charitable fund(s) or purpose(s) that you specify, and a formal acknowledgement of your gift (indicating the value of your gift for federal tax purposes) will be mailed to you. Thank you for your interest in using securities to support the charitable causes that have special meaning for you.

#### **IRA Transfers:**

Please direct IRA transfer donations in the form of a check, directly to the Eau Claire Community Foundation, 306 South Barstow St, Suite 104, Eau Claire WI 54701. The Foundation will work directly with the donor on the purpose of the donation. Please note: Distributions from IRAs, under the special rules for *donor advised funds*, will be recognized as income first then the charitable donation can be itemized as a deduction. Please consult your professional advisor for tax advice.

For more information contact:

Sue Bornick  
Executive Director  
Eau Claire Community Foundation  
306 S. Barstow St. Suite 104, Eau Claire, WI 54701  
715.552.3801 or [suebornick@eccommunityfoundation.org](mailto:suebornick@eccommunityfoundation.org)