



# ThedaCare<sup>®</sup>

Family of Foundations

## STOCK DONATION TRANSFER INSTRUCTIONS

1. Thank you for your interest in supporting the ThedaCare Family of Foundations. Donors may instruct brokers and trust officers to transfer securities intended for charitable contributions to our account at BMO using the following transmittal instructions:

**Account Name:** ThedaCare Family of Foundations, Inc.

**Account #:** 71-L093-01-1

**DTC#:** 992

**ThedaCare Family of Foundations Tax ID#:** 46-4112255

**BMO Contact Name:** Ms. Peggy Dimitrakakis

**BMO Contact Phone:** (414) 287-8606

2. In an effort to ensure the contribution is directed as intended, it is helpful if the donor, or the donor's broker, notifies the ThedaCare Family of Foundation of the intended transfer prior to transmittal. Please feel free to share this information with:

**Contact Name:** Shannon Marsden, Director of Foundation Operations & Analytics

**Contact Phone #:** (920) 454-1254

**Contact E-mail Address:** Shannon.Marsden@thedacare.org

**Contact Mailing Address:** 1818 N. Meade St., Appleton, WI 54911

3. The ThedaCare Family of Foundation's policy is to sell all shares upon receipt. The sale proceeds will be allocated to the fund that you specify, and a formal acknowledgement letter (indicating the value of your gift for tax purposes) will be mailed to you.

*For more information on the ThedaCare Family of Foundations - and to learn how contributions are being used to improve the patient experience - please visit us online at [www.thedacare.org/foundations](http://www.thedacare.org/foundations).*