



Making a Gift of Stock to the Greater Milwaukee Synod - ELCA

Thank you for considering a donation of stock to the Greater Milwaukee Synod (ELCA.) Every gift of stock to the Greater Milwaukee Synod should be preceded by a **Notice of Intent to Transfer Stock** (sample below) that states:

- . Your intention to donate the stock to the Greater Milwaukee Synod
- . The name of the stock being donated
- . The number of shares being donated

The “Notice of Intent” should be sent to the Greater Milwaukee Synod. A copy of the “Notice of Intent” may also be sent to BMO Harris. A “Notice of Intent” form is provided below for your convenience.

Greater Milwaukee Synod
ATTN: Financial Administrator
Mailing Address: PO Box 341695, Milwaukee, WI 53234
Physical Address: 1212 S. Layton Blvd, Milwaukee, WI 53215
finance@milwaukeeesynd.org
Phone: 414-671-1212
FAX: 414-671-1756

Operations
BMO Harris – Financial Advisors
111 E. Kilbourn Ave
Milwaukee, WI 53202
Phone: 414-423-2398

Electronic transfer to the Greater Milwaukee Synod account at BMO Harris – Financial Advisors. Ask your broker to transfer the designated stock to **Greater Milwaukee Synod, Account #1143-3839**. The BMO Harris Depository Trust Company (DTC) number is **0075**.

If you or your broker have questions, please contact the Operations Department at 1-800-472-0060.

Thank you for your gift to the Greater Milwaukee Synod (ELCA.)

Notice of Intent to Transfer Stock to THE GREATER MILWAUKEE SYNOD (ELCA)

Please notify your broker and then send this form to the Greater Milwaukee Synod. You may also send a copy to the Operations Department at BMO Harris- Financial Advisors if you wish.

Financial Administrator
Greater Milwaukee Synod
PO Box 341695
Milwaukee, WI 53234
Phone: 414-671-1212
finance@milwaukeeesynd.org
FAX: 414-671-1756

Operations Department
BMO Harris – Financial Advisors
111 E. Kilbourn, Suite 200
Milwaukee, WI 53202
1-800-472-0060

BMO Harris - Financial Advisors DTC# - 0075

Greater Milwaukee Synod's account at BMO Harris
Account #1143-3839

Greater Milwaukee Synod's Tax ID number:
EIN 36-3514257

Donor Information

Donor's Name: _____ Phone _____

Donor's Address: _____

Do you prefer your gift to remain anonymous? _____

Stock Information

Date of Broker Notification or Certificate Mailing Date: _____

Name of Security(ies) and Number of Shares:

Transferring Broker

Brokerage Firm: _____

Broker's Name: _____

Telephone: _____