



111 N. Fairchild Street, Suite 260 | Madison, WI 53703
608.232.1763 | 888.400.7643 | madisongives.org

PLEASE READ THIS IMPORTANT NOTE: *You must notify Madison Community Foundation (MCF) prior to transferring securities so that we may instruct our financial institution to accept the gift. Please include the name of security, number of shares, donor name, timing of the transfer, and designation. If we are not able to advise the financial institution in advance, the transfer will be rejected.*

MCF's federal tax ID: #39-6038248

MCF contacts for securities transfers:

Harmony Kronick
Senior Operations Director
608.446.5939
hkronick@madisongives.org

Carmen Jeschke
Vice President, Finance & Operations
608.446.5932
cjeschke@madisongives.org

MCF has different instructions to receive gifts of stock and mutual funds. Be sure to review the details of your gift carefully and select the appropriate option below.

STOCKS

We request all financial institutions that are initiating gifts of **stock** to Madison Community Foundation be delivered via DTC to our Principal Custody Solutions account, according to the following instructions:

DTC #..... 2925
Agent Bank ID # 00078861
Institution..... 00078861
Principal Financial Account # 13383805
Principal Financial Client Account Name Madison Community Foundation –
Gift Account

Street address for Principal Custody Solutions.....ATTN: Client Services/MN Service Center
222 South 9th Street, Floor 13
Minneapolis, MN 55402

MUTUAL FUNDS

We request all financial institutions that are initiating gifts of **mutual fund** shares to Madison Community Foundation be delivered to our Fidelity brokerage account, according to the following instructions.

Madison Community Foundation account # X25-861855
Type of Account Unincorporated Association
Fidelity DTC number 0226

Street address for Fidelity Investments.....Fidelity Investments
Attn: TOA Receives
PO Box 770001
Cincinnati, OH 45277-0036