WELS Foundation
Wisconsin Evangelical Lutheran Synod

N16W23377 Stone Ridge Drive • Waukesha, WI 53188-1108
Phone: 800-752-8940 • wels.net/foundation

GIFT OF SECURITIES PROCEDURES *VIA CHARLES SCHWAB*

To facilitate charitable giving to WELS and WELS-affiliated ministries, WELS Foundation processes gifts of securities benefiting WELS or ELS ministries including congregations, area Lutheran high schools, or any WELS-affiliated ministry. WELS Foundation does not charge for this service.

Below are the steps to complete an electronic transfer of securities through WELS Foundation.

STEP 1

Notify WELS Foundation of your intent to make the gift. Please provide our staff with the following:

- ❑ Donor name, mailing address, phone number, and e-mail
- ❑ Name and/or ticker symbol of marketable security
- ❑ Number of shares donated
- ❑ The ministry/ministries that will benefit (please include the ministry name, address, and gift purpose, if other than "undesignated")
- ❑ Please note if your gift should remain anonymous

Please provide the above information to WELS Foundation by e-mail:

- **E-mail:** WELSFoundation@wels.net
- **Phone:** Megan Butz at 414-256-3262
  Jaime Gildemeister at 414-256-3213

STEP 2

Contact your financial advisor or investment company to request a transfer to WELS Foundation's account at Charles Schwab.

Helpful information your financial advisor may need:

- **WELS Foundation information:**
  - Federal tax EIN: 39-6084446
  - Account name: WELS Foundation, Inc.
  - Account number: 8832-8006
- **Charles Schwab service representative phone:** 1-800-435-4000
- **Charles Schwab DTC (Depository Trust Corp.) number:** 0164
- **Charles Schwab address:** 3000 Schwab Way, Westlake, TX 76262

STEP 3

When the securities are received in WELS Foundation's brokerage account, they will be liquidated. The net proceeds from the sale will be distributed to the ministries that you designate. WELS Foundation will mail you the appropriate gift acknowledgment for tax purposes. This process can take up to two weeks.

Rev. 10-2025