

Stock Gifts

Option 1 – The preferred method is to have the funds transferred via Associated Bank:

GGBCF DTC# 2257

Account #65-6091-01-4
(Contribution Trust Account)

Primary Contact: Ryan Thomson
(920) 433-3269 (phone)
Ryan.Thomson@associatedbank.com

For mutual fund gifts, please contact Ryan Thomson to obtain delivery instructions.

The donor must:

- 1 – Have his/her name indicated on the transfer. **Please make sure the broker includes your name when sending the gift or the gift will be received as anonymous.*
- 2 – Name of the account they want the stock to be applied to on the transfer so the bank can accept the shares.

Option 2 – If they donor wants to use their own broker:

The shares MUST be transferred to an account held in the name of the Greater Green Bay Community Foundation Inc (39-1699966). They should be sold as soon as administratively possible and a proceeds check mailed to GGBCF.

Option 3 – If actual stock certificates are brought to the Foundation:

The donor and the Foundation CAN NOT sign them.
A photocopy needs to be retained by the Foundation.
The donor will have to sign a stock power of attorney form.
The certificates need to be delivered to Molly Carlson at Associated Bank.
These transactions take longer to settle.