Updated: April 2018



## Instructions for donation of securities to La Crosse Public Education Foundation

We have established a simple process for donating publicly traded securities to the La Crosse Public Education Foundation.

Contact your broker and provide them with the following information.

Securities (including stocks, mutual funds, municipal and corporate bonds, and treasury bills and notes) may be transferred through the LPEF account at Trust Point, Inc.

Bank of New York
DTC #901
A/C #270002

A/C Name: Trust Point, Inc.

FBO: La Crosse Public Education Foundation or LPEF

To expedite processing, please notify us in advance of the transaction and indicate the purpose of the donation. Please contact:

David Stoeffler, Executive Director, LPEF

Phone: (608) 787-0226

Email: david@lacrosseeducationfoundation.org

LPEF's policy is to liquidate securities as soon as practical upon receipt. Proceeds from the sale of securities are considered unrestricted gifts unless the donor has imposed a restriction as a condition of the gift in which case procedures for accounting for restricted contributions will be followed.

Disclaimer: Publicly traded securities are subject to market volatility and the La Crosse Public Education Foundation cannot guarantee the price received for in-kind donations upon liquidation. For gifting purposes, the securities are valued at the average of the highest and lowest values on the date the gift was made.