



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.

FOR GIFTS OF STOCK, CORPORATE & MUNICIPAL BONDS:

Fidelity Investments

DTC 0226

Trust Point Inc.

A/C #628-094675

FBO: La Crosse Public Education Foundation or LPEF

FOR GIFTS OF MUTUAL FUNDS:

Fidelity Investments

DTC 0226

Trust Point Inc.

A/C #633-014362

FBO: La Crosse Public Education Foundation or LPEF

FOR GIFTS OF GOVERNMENT ISSUES (GOV'T BONDS, TREASURY BILLS & NOTES)

Book to: Bank of New York Mellon ABA#021000018, Bank of NYC/NRS

Trust Point

Account: 628-094675

Please contact us in advance of the transaction and inform us of the delivering institution and account number, the name and quantity of securities to be transferred, and 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.