



Transfer Instructions Stock and Securities

Many people inquire about gifting stocks, mutual funds, and various other securities to the Froedtert Hospital Foundation (FHF). Most stock transfers are handled electronically. It's easy to do and a wise use of your non-cash assets. The first step is to contact your broker or financial advisor and provide them with the following information to transfer stock electronically into FHF's account at Robert W. Baird:

FHF Broker Information:

Bradley Niswonger
Robert W. Baird & Co., Inc.
(414) 765-3559 or
bniswonger@rwbaird.com

Assistant: Julie Shane, (414) 765-3929/
jshane@rwbaird.com

FHF Account Information:

Froedtert Hospital Foundation
A/C number: 3488-9673
Tax ID: 39-1431192

DTC Number:

0547

Stock gifts made electronically are usually processed within 3-4 days. You will receive an acknowledgement letter for the gift. This letter will include the value of the stock on the date it is sold at Baird. The value is based on the average price per share on the date of sale times the number of shares.

If you have additional questions, contact Mary Echeverria, Sr. Business Manager at (414) 955-4710 or donations@mcw.edu.