



Transfer Instructions Stock and Securities

Many people inquire about gifting stocks, mutual funds, and various other securities to the Medical College of Wisconsin (MCW). 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 MCW's account at Robert W. Baird:

MCW Broker Information: **Stephen D. Hoch, CFP**
Robert W. Baird & Co., Inc.
(414) 765-3890 or shoch@rwbaird.com

Jennifer Haldemann, CFP
(414) 298-7545 or
JHaldemann@rwbaird.com

**Assistants: Leah Davis, (414) 765-3681/
Lmdavis@rwbaird.com and**
**Anne Gutierrez (414) 298-6173/
agutierrez@rwbaird.com**

MCW Account Information: **Medical College of Wisconsin, Inc.**
A/C number: 5787-8669
Tax ID: 39-0806261

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.