

Meadowbrook Church Stock/Securities Donation Procedures

When making a charitable donation of securities to Meadowbrook Church, follow these easy steps!

If your broker holds stock in “*street name*”, they can transfer the shares electronically to the account listed below:

1. Broker Company: Baird Wealth Management
2. Broker Contact and Telephone: Dale Wroblewski, (414) 298-1915
3. Account Number: 57831699
4. Name on Account: Meadowbrook Church, Inc
5. DTC #: 0547
6. Please advise Veronica David (vdavid@mbctosa.org) at Meadowbrook Church of the number of shares, the full name of the stock you are donating, and the firm that the shares are coming from with the anticipated deliver date.

If you physically hold the actual stock:

1. In the presence of a bank official who can **Medallion Guarantee** your signature, sign the back of the stock certificate identical to the registration on the front, at the place marked “signature”.
2. Prepare a letter to **The Falci Group**, requesting the shares be gifted to Meadowbrook Church at account number “**57831699**”.
3. Deliver the **Medallion Guaranteed** signed stock certificate and the **Falci Group letter** to Veronica David at Meadowbrook Church (do not assign or reissue the stock to Meadowbrook Church). Once the back of the stock certificate is signed, the stock is negotiable. Please handle the certificate with care.
4. Meadowbrook Church will mail the stock and letter via certified mail to our broker.

To ensure that we can provide you with an accurate and timely acknowledgement of your donation for your tax records, it is critical that you or your broker inform us of the name of the stock you are gifting, and the number of shares being gifted.

If you have any questions, please contact Kris Haugen at (414) 316-2482 or via email at khaugen@mbctosa.org.