



Electronic Stock Transfer Instructions

Below are instructions on transferring stock to Winona State University Foundation.

1. Contact WSU at 507-457-5020 or 800-242-8978 ext. 5020 and inform us a stock transfer will be made
2. We will need:
 - a. The name of your broker
 - b. The name of the stock that will be transferred
 - c. The number of shares that will be transferred
 - d. The approximate value
 - e. The name of the WSU Foundation Fund where the donor wishes the gift to go (i.e. Unrestricted Fund)
3. To complete the transfer to the WSU Foundation:
 - a. Provide your broker with the "SEI Trust Company" name and the account numbers listed below:
 - i. SEI Trust Company
 1. WSU's asset holding company. They hold the stock until it is deposited into the WSU Foundation account
 2. WSU's bank, Winona National Bank, manages the stock transfers
 - ii. SEI Trust Company's Depository Transfer Check (DTC) Participant #2039
 - iii. Winona National Bank's Agent Internal Account # 11053C
 - iv. Winona National Bank's Institution # 94952
 - v. WSU's Foundation # WN550
4. WSU will contact the Winona National Bank Trust Department to alert them of the transfer.
 - a. Winona National Bank, 204 Main St., Winona, MN 55987, 507-454-9218
5. The value of the stock is determined by the average of the high and low on the day of the transfer. Winona National Bank will sell the stock.
6. Once the data transfer is complete, Winona National Bank averages high and low of the day and that is the value
7. Once stock is received, Winona National Bank will provide a Gift Acceptance Form, which will be mailed to the donor.

Thank you for all the ways you make a difference!