



## Electronic Stock Transfer Instructions

Electronic stock transfers to the Winona State University Foundation are facilitated through the SEI Trust Company and Winona National Bank.

Instructions on transferring stock to the Winona State University Foundation:

1. Contact your Development Director or University Advancement at 507-457-5020 or 800-242-8978 ext. 5020 and inform us a stock transfer will be made
2. We will need the following information from you:
  - The name of your broker
  - The name of the stock that will be transferred\*
  - The number of shares that will be transferred
  - The approximate value
  - The name of the WSU Foundation Fund where the donor wishes the gift to go (i.e. Unrestricted Fund, name of scholarship)
3. To complete the transfer to the WSU Foundation, provide your broker with the following information:
  - SEI Trust Company's Depository Transfer Check (DTC) Participant #2039  
SEI will hold the stock until it is deposited into the WSU Foundation account at Winona National Bank
  - Winona National Bank's Institution # 94952
  - Winona National Bank's Agent Internal Account # 11053C
  - WSU's Foundation account #WN550
4. WSU will contact the Winona National Bank Trust Department to alert them of the transfer.
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. Two Trust Department Gift Acceptance forms are sent to the WSU Foundation when the stock is received. The original will be sent to you and a copy will be kept in our office.

\*Note: If you would like to transfer shares of a mutual fund, please ask your broker to check the prospectus to verify the limitations or restrictions to donating shares. Mutual funds can take 4-6 weeks for transfer to occur; therefore, transfers after November 1 cannot be guaranteed to be received by the WSU Foundation by December 31.

***Thank you for all the ways you make a difference!***