



Procedure for Donation of Securities

When a donor notifies Girl Scouts of the Northwestern Great Lakes (GSNWGL) that they would like to make a donation of securities (ie: mutual funds, stocks, bonds, etc):

1. Send the attached 'Donor Designation of Securities' Form and Delivery Instructions to the donor (or the delivering agent handling the transfer on behalf of the donor).
2. Once the completed form has been returned to you from the donor (or delivering agent), please forward the 'Donor Designation of Securities' Form to:
 - a. Colleen Bennett, Comptroller
 - b. Angela Thoune, CDO
3. Angela Thoune and Colleen Bennett, as well as FD Manager if necessary, will meet to discuss how the donated securities will be handled.
4. Colleen Bennett will forward the information and handling instructions to Fiduciary Partners, so they are aware of the incoming transfer.

Per the Council Gift Acceptance Policy

Gifts with no stipulations by the donors as to their purpose or use are unrestricted. Gifts given for a specific purpose designated by the donor shall be restricted. Annual giving donations are to be unrestricted gifts toward the general operating expenses of the council.

To restrict a donation, the gift must be \$5,000 or more and must be designated for an anticipated expense of the council in the present year and not designated for establishment of a new project. Restrictions on gifts under \$5,000 will be considered on a case-by-case basis by the Comptroller and Chief Development Officer.

Publicly Traded Securities

- Securities which are traded on the New York, American or over-the-counter stock exchanges, as well as publicly-traded mutual funds, municipal and corporate bonds, treasury bills and notes, warrants, stock options and stock appreciation rights may be accepted by the Council. Title to securities deemed to be readily transferable presents no particular difficulty to the Council. However, in cases where limitations may exist on the transfer of warrants, stock options and stock appreciation rights, the Finance Committee may review such gifts in advance to determine if such gifts are acceptable.
- In most cases, the Council's policy is to sell all securities accepted by the Council. In no event shall an employee or volunteer working on behalf of the Council commit to a donor that a particular security will be held by the Council, unless previously authorized to do so by the Finance Committee.
- It is the Council's preference that any gift of publicly traded securities be effectuated by a transfer from the donor's brokerage account to the designated primary Council's brokerage account. As needed, the Council's Chief Executive Officer and designated development officer shall share with its fundraising administrator's information, which will enable its fundraising staff to complete such gifts. The Council will also accept publicly traded stock gifts which are completed by other legal means, including delivery of properly endorsed stock certificates, and a transfer of stock shares from a donor's account to a newly-established account for the Council at the same brokerage house.

The council will not accept gifts of closely held stock or restricted stock.



Donor Designation of Securities

Thank you for your interest in donating to the Girl Scouts of the Northwestern Great Lakes, via securities (ie: mutual funds, stocks, bonds, etc). Our Council serves over 15,000 girls and 2,000 adults within our 58-county region of northern Wisconsin and the upper peninsula of Michigan. Throughout the council, we provide leadership experiences, STEM programming, outdoor opportunities, and so much more, but we couldn't do it without you. Thank you for making your donation to further our mission of building girls of courage, confidence, and character, who make the world a better place.

Please complete the following information, so we may record your designation:

Full Name(s): _____

Please list us as anonymous in publications

Address: _____

Phone (Home): _____ Phone (Cell): _____ Phone (Work): _____

Name of Company that will send security to our investor: _____

Name and amount of security that will be donated: _____

Direct my gift to: Where it's needed most Camp Financial Assistance

This gift is: In Memory of _____ **Name** In Honor of _____ **Name**

Anticipated deliver date or time-frame: _____

Return the completed form to:

Girl Scouts of the Northwestern Great Lakes, Inc
Attn: Fund Development
4693 N Lynndale Dr
Appleton, WI 54913

Fax: 920-734-1304

Email: development@gsnwgl.org



Delivery Instructions

Please give the following delivery instructions to the delivering agent that will handle the transfer of your securities. Delivering Agent, please transfer the donated securities to:

Receiving Firm: Fiduciary Partners Trust Company

Account Name: Girl Scouts of NWGL – Council Initiatives

Account #: 314601

<p>DTC Eligible Securities</p> <p>DTC #: 2116 (Fifth Third Bank) Account #: 010039620071 Account Name: Fiduciary Partners Trust Company FFC: FPTC Account # and Name (above ref)</p>	<p>FED Book Entry Securities (Including GNMA)</p> <p>ABA #: 042000314/FIFTH CIN/1050 Account #: 010039620071 Account Name: Fiduciary Partners Trust Company FFC: FPTC Account # and Name (above ref)</p>	<p>Mutual Funds</p> <p>In applicable, deliver funds per supplemental delivery instructions provided by Fifth Third Bank.</p>
<p>Physical Deliveries</p> <p>Fiduciary Partners Trust Company 3913 W Prospect Ave Ste. 201 Appleton, WI 54914-8797</p> <p>or to specific supplemental instructions</p>	<p>Euroclear</p> <p>Euroclear #: 97816 A/C Bank of New York A/C 135500 Account Name: Fifth Third Bank FFC #: 010039620071 Account Name: Fiduciary Partners Trust Company</p>	<p>Global Physical Deliveries</p> <p>The Bank of New York One Wall Street Third FI Window A New York, NY 10286 For Account #: 135500 FFC: Fifth Third Bank FFC A/C #: 010039620071 Account Name: Fiduciary Partners Trust Company</p>
<p>Wire Transfer</p> <p>BMO Harris Bank 770 N Water St Milwaukee, WI 53202 ABA #: 071000288 Credit A/C: 20890650 Account Name: Fiduciary Partners Trust Company FFC: Account # and Name</p>	<p>ETF/ACH Transfer</p> <p>BMO Harris Bank 770 N Water St Milwaukee, WI 53202 Credit A/C: 20890650 Account Name: Fiduciary Partners Trust Company Addendum: Account # and Name</p>	<p>Checks</p> <p>Payable to: Fiduciary Partners Trust Company fbo Account # and Name</p> <p>Mail to: (overnight and regular) Fiduciary Partners Trust Company 3913 W Prospect Ave Ste. 201 Appleton, WI 54914-8797</p>
<p>Questions regarding incoming transfer can be addressed to our Operations Transfer Team:</p>		
<p>Fiduciary Partners Trust Company 3913 W Prospect Ave Ste. 201 Appleton, WI 54914-8797</p> <p>Telephone: 920-380-9960 Fax: 920-882-4271 operations@fiduciarypartners.com</p>	<p>Cost Basis Reports</p> <p>We are a non-CBRS Member.</p> <p>Preferred Method to send cost basis information: email Excel format, if available, to operations@fiduciarypartners.com</p> <p>Optional Method: Fax or Mail</p>	