



How to Give Mutual Funds to The Wilderness Society

Thank you for considering a gift of mutual fund shares to The Wilderness Society! Making a gift of appreciated assets is a wonderful way to support our critical work to protect our nation's natural heritage – and it's easy! *However, gifts of mutual funds take longer to process than gifts of stock; allow at least 4 weeks for the transfer of your gift to be completed.*

Prefer to make a gift of stock? Contact us at stockgifts@tws.org for instructions on how to make a gift of securities.

Step 1: If your broker is able to make use of the Automated Customer Account Transfer Service (ACATS) please have them use the following information to transfer your gift:

Account: THE WILDERNESS SOCIETY - GIFTS
Federal Tax ID Number: 53-0167933
DTC Number: 2803
Agent Bank ID Number: 12278

Account Number: 5000286-004
U.S. Bank Reference: Acct Manager, Juanita Dixon
juanita.dixon@usbank.com / 202-262-0784

Step 2: If your broker is unable to send your gift via ACAT please have them complete the attached US Bank form *Incoming Mutual Fund Gift Form* and send it to Juanita Dixon at US Bank. (juanita.dixon@usbank.com / 202-262-0784) Juanita and her team will work directly with your broker to facilitate the processing of your gift.

Step 3: Please tell us about your gift! Many of the gifts we receive as securities do not include the names of our donors, and we want to be able to thank you for your gift. Notifying us is as easy as sending an email to Andrea O'Brien at mutualfunds@tws.org or calling her at (202) 429-2626 with the following information:

- Your name, address, and phone number
- Name of the security
- Number of shares transferred
- Name and city of your brokerage
- Name and phone number of your broker
- Date you spoke with your broker or expected date of transfer

And that's it! If you have any questions, let us know. You can reach us by email at stockgifts@tws.org or by phone at (202) 429-2626.