



## How to Give Mutual Fund Shares 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! *Please note: gifts of mutual funds take longer to process than gifts of stock; allow at least 4 weeks for the gift to be completed.*

*Prefer to make a gift of stock? Contact us at [stockgifts@tw.s.org](mailto:stockgifts@tw.s.org) for instructions on how to make a gift of securities.*

**Step 1:** Share the following information with your broker:

Account:	The Wilderness Society-Gift Stock Account
Federal Tax ID Number:	53-0167933
DTC Number:	2027
Agent Bank ID Number:	94866
Account Number:	25767500
Contact at Wells Fargo:	(254) 761-6988   <a href="mailto:TEXASCSC@wellsfargo.com">TEXASCSC@wellsfargo.com</a>

**Step 2:** Tell us about your gift! After you initiate the transfer of your mutual fund shares, we'll follow up with our bank using the information below to ensure that your gift transfers as quickly as possible (the process can take several weeks). Please contact us and share the following information by sending an email to Andrea O'Brien at [mutualfunds@tw.s.org](mailto:mutualfunds@tw.s.org) or calling her at (202) 429-2626:

- Your name, address, and phone number
- Fund Name and CUSIP/Fund Symbol of the asset(s)
- Number of shares to be 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

We'll take it from here! If you have any questions, let us know. We can be reached by email at [mutualfunds@tw.s.org](mailto:mutualfunds@tw.s.org) or by phone at (202) 429-2626.

Thank you for acting to protect our precious wildlands!