

# Making a Gift to Rethos: Stock Transfer Instructions

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## Stock Gift Instructions

Thank you for your support of Rethos and our programs in historic preservation, education, building reuse, and public policy. A gift of stock is a great way to maximize the value of your investment fully by avoiding capital gains taxes while making a significant charitable contribution to Rethos.

To make your stock donation, please follow the directions below. If you have any questions along the way, please call Rethos at 651-293-9047.

## Electronic Transfer

The simplest way to make a gift of stock is to contact your broker and electronically transfer the stock from your account to our account at:

RETHOS DTC NUMBER: 0141  
RETHOS ACCOUNT NUMBER: 2835-3028  
RETHOS EIN: 41-1427970  
Rethos Brokerage Account Contact at Wells Fargo:

Jennifer Wesley  
[jennifer.wesley@wellsfargoadvisors.com](mailto:jennifer.wesley@wellsfargoadvisors.com)

- 1) [Download the Letter of Authorization](#) (LOA) to complete and forward to your broker.
- 2) To best insure you are properly receipted for your gift, please take these steps when contacting our broker. Let them know:
  - ✓ Your name
  - ✓ Your phone number
  - ✓ Your broker's name and phone number
  - ✓ The stock you are giving and the number of shares (e.g. 20 shares of Microsoft)
- 3) Notify Rethos about your transfer. We want to fully acknowledge your generosity!

[info@rethos.org](mailto:info@rethos.org)  
651-293-9047

- 4) Confirm your transfer with your broker-advisor.

Thank you once again for your generosity and thoughtfulness. Your gift to Rethos makes a tremendous difference!

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**You may also wish to include Rethos in your estate plans. It's easy, costs nothing today, and you can change your mind at any time.**

Suggested language for including Rethos in your Will or Trust:

*"I hereby give/bequeath (\$\_\_\_\_\_ or \_\_\_\_\_ % of the residue of my estate) to Rethos, a 501(c)3 nonprofit organization dedicated to historic preservation located at 416 Landmark Center, 75 West Fifth Street, Saint Paul, Minnesota 55102. Rethos' EIN is 41-1427970. My gift shall be considered unrestricted in its use by Rethos or limited to the following use(s). Should my expressed donative intent no longer be needed or practicable, I authorize the board of directors of Rethos to use my gift as they see fit."*