

# Oak Hills Memorial Foundation Securities Gift Form

**Thank you for including us in your planned giving. Your gift is a blessing!**

Below you will find all the necessary information to complete your gift transaction.

1. Contact your broker and inform them of the stock/bond and number of shares you wish to transfer to Oak Hills Memorial Foundation.
2. Complete this form return to Oak Hills Memorial Foundation for tax and gift acknowledgement.

Name & Type of Stock/Bond	
Number of Shares	
Date of Transfer	
Donor's Name	
Donor's Street Address	
Donors, City / State / Zip	
Donor's Phone	
Broker's Name	
Broker's Company	
Broker's Phone	

## Information to assist you and your broker:

Oak Hills Memorial Foundation Investment Firm

Investment Account Number  
Electronic Fund Transfer

Oak Hills Memorial Foundation Tax-ID

Frandsen Bank & Trust- Wealth Management  
100 North Minnesota Street  
New Ulm, MN 56073  
(507) 233-4800  
006206

Frandsen Bank & Trust's account number is: 01010039433582; our Depository Trust Company (DTC) number is: 2116

41-1733850

## Next Steps:

Oak Hills Memorial Foundation will confirm your gift of securities with an official acknowledgement letter. Oak Hills Memorial Foundation is a 501©3 non-profit and your contribution is tax deductible to the fullest extent provided by law. Please contact your tax advisor for complete tax deductibility rules. Questions? Please contact Wendy Lang, Fund Development Director at 507-233-0851 or [wendylang@oakhillsmemorialfoundation.com](mailto:wendylang@oakhillsmemorialfoundation.com)

