



Assisted Living & Memory Care

Giving Stock to Bell Tower/ Wisconsin Illinois Senior Housing Inc.

Thank you for considering a stock gift to Bell Tower Residence's Capital Campaign. The most direct way to contribute stock is through an electronic transfer (DTC) from your brokerage account. Please follow the steps below to notify Bell Tower/ WISH of your stock gift.

1. Complete and mail or email this form to Bell Tower:
By Mail: Bell Tower Residence
Attn: Capital Campaign
1500 O'Day Street
Merrill, WI 54452
By Email: Egrubb@carriagehealthcare.com
2. Provide your broker with the following information regarding our Kestra Investment Services Charitable account:

Transferee Information

Company Name: Wisconsin Illinois Senior Housing Inc. **Wisconsin Illinois Senior Housing Inc. Address:** 13185 W Green Mountain Drive Lakewood, CO 80228
Federal Tax ID Number: 36-4016275

Brokerage Information

Brokerage Name: Kestra Investment Services **Account Name:** Wisconsin Illinois Senior Housing Inc. **Account Number:** J7M-087968
DTC: 0226

Kestra Investment Services Address: 5707 Southwest Parkway
Building 2, Suite 400
Austin, TX 78735

Contact: Dan Sommers
Email: dan@partnerswealth.com

3. Once the transfer has been instructed, please contact egrubb@carriagehealthcare.com to confirm receipt of your gift and provide a timely acknowledgement letter.

The date of your gift is the date your shares are received into the Bell Tower/ WISH account.
The value of your gift is based on the average of the high and low of the stock on that date.

DONOR INFORMATION

Name: _____

Address: _____

Phone Number: _____

Email: _____

STOCK INFORMATION

Name of stock(s): _____

Number of shares: _____

Estimated Dollar Amount: _____

Signature

Date