

# The Annexstad Family Foundation

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*Thank you for your interest in support of The Annexstad Family Foundation and our mission to help build America's next generation of leaders! Your gift of cash or appreciated stock will have an immediate impact upon The Annexstad Family Foundation's scholarship programs. The Annexstad Family Foundation is a tax-exempt charitable foundation organized under Sec 501(c)(3) of the Internal Revenue Code (EIN: 41-1975043).*

*Please direct any questions to Richard Sherwood, Executive Director at 906-776-1952 or by email at [rjsherwood@annexstadfamilyfoundation.org](mailto:rjsherwood@annexstadfamilyfoundation.org).*

## **CASH DONATION**

Please make your check payable to: The Annexstad Family Foundation and mail along with this signed form to:

Richard Sherwood, Executive Director  
The Annexstad Family Foundation  
W9429 Peterson Drive  
Iron Mountain, MI 49801

## **Donor Information**

The donation will be recorded and the acknowledgement sent to the name and address listed below.

Donor's Name: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Check Box if Applicable:

I have submitted matching donation information to my employer.

Signed: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Date \_\_\_\_\_

**STOCK DONATION**

Gifts of publicly traded stock and/or mutual fund shares which have appreciated (increased in value) may create an income tax deduction for the donor based on the asset's fair market value. Contact your personal tax advisor to determine how such a gift may provide tax benefit to you. To help you facilitate a gift of stock or mutual funds, please follow these instructions:

**Step 1: Provide Donor Information**

The donation will be recorded and an acknowledgement will be sent to the name and address listed below.

Donor's Name: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Step 2: Select Stock**

a. Identify the stock and number of shares that you wish to gift.

CUSIP #	Name of Security	Number of Shares	Cost Basis (Total)

b. Electronic Delivery Instructions

Your broker should contact Wells Fargo Institutional Trust Services, agent for the Annexstad Family Foundation, to obtain transfer instructions and coordinate delivery of the shares. The Wells Fargo contact is:

Kyle Bodkins, Trust Officer  
Phone: 612-667-6260  
Email: Kyle.D.Bodkins@wellsfargo.com

Transferring Brokerage Firm: \_\_\_\_\_  
Broker's Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Check Box if Applicable:

I have submitted matching donation information to my employer.

**Step 3: Mail or email a copy of this signed form to:**

Richard Sherwood, Executive Director  
The Annexstad Family Foundation  
W9429 Peterson Drive  
Iron Mountain, MI 49801  
rjsherwood@annexstadfamilyfoundation.org

**Signed:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_