Making a Gift to Rethos:
Stock Transfer Instructions

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

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
   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!

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.”