

Milwaukee Symphony Orchestra Stock Gift FAQ's

Donating your gift of publicly traded stock to the MSO is easy. Simply authorize your broker to transfer shares to the MSO's account at one of the following brokerages.

MSO Federal Tax ID #39-6023436

Brokerage Information



MORGAN STANLEY

BROKER

Susan Martin

414.226.3013

MSO Account

#303-109649-163

DTC #0015



ROBERT BAIRD

REPRESENTATIVE

Matthew Schmidt, ECAB Investment Group

414.765.3500

MSO Account

#5945-3445

DTC #0547

Valuing Stock

The MSO credits a donor for a stock gift on the *date of transfer*. We value a gift according to the median of the high and low prices of the stock on the transfer date and the number of shares gifted.

When transacting a gift of stock to the MSO, please ensure your name is included in the transfer so that we may provide you with the appropriate tax receipt. If you do not wish to be publicly recognized, please let us know directly and we will ensure your gift remains anonymous. Contact Karli Larsen, Director of Development Operations, at larsenk@mso.org, or by phone at 414.226.7848.

It is the MSO's policy to sell stock shares as soon as they are donated.