

Making a Gift of Stock to the Milwaukee Symphony Orchestra

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.

Brokerage Information:

Morgan Stanley

BROKER:

E. Marie Broussard
414.226.3153
EMarie.Broussard@morganstanley.com

MSO Account #: 303-109649-163

DTC #: 0015

Robert Baird

REPRESENTATIVE:

Jaime Johnson, ECAB Investment Group
414.765.3500

MSO Account #: 5945-3445

DTC #: 0547

MSO Federal Tax ID #: 39-6023436

Valuing Stock:

The MSO credits a donor for a stock gift on the date of transfer. We value the gift according to the median price of the stock on the transfer date and the number of shares gifted. It is the MSO's policy to sell stock shares as soon as they are donated.

When transacting a gift of stock to the MSO, your name may not be included in the transfer. Please notify us in advance so that we may recognize you and thank you for your gift. Contact Michael Rossetto, Director of Individual Giving, at rossettom@mso.org or by phone at 414.226.7891.