

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.

Brokerage information

Morgan Stanley

Broker: Susan Martin 414.226.3013

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 Shannon Rolbiecki, Senior Director of Advancement, at rolbieckis@mso.org or by phone at 414.226.7804.

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