



Giving Made Easy

Thank you for considering a gift to ULS; please let us know if you are planning a stock or wire transfer so we can anticipate and acknowledge your gift.

Stock Transfer Instructions

Broker: JPMorgan Chase Bank, N.A.
DTC Number: 902
Credit Account Number: P72500
FFC Account Number: B60407008
FFC Account of: The University Lake School
Tax ID/EIN: 39-0942763

Wire Instructions

Receiving Bank: Ixonia Bank - W1046 Marietta Ave Ixonia, WI 53056
Receiving Bank ABA #: 0759 09408
Beneficiary Name: University Lake School, Inc.
Beneficiary Address: 4024 Nagawicka Rd, Hartland, WI 53029
Beneficiary Account #: 40018699
Tax ID/EIN: 39-0942763

Check Gifts *Please make your check payable to University Lake School and mail to:*
University Lake School - Annual Fund
4024 Nagawicka Road, PO Box 290, Hartland, WI 53029

Credit Card Gifts *Visit universitylake.org/give.*

Donor-Advised Funds *Use our EIN and School name*

Required Minimum Distributions *If you are 72 or over, there's a good chance Uncle Sam requires an annual withdrawal from IRAs and other retirement accounts. If you give directly to ULS from such an account, you can typically enjoy a non-trivial tax break on appreciated assets.*

De Peyster Society *Please consider including ULS in your estate planning, joining the many proud members in honor of our beloved first Headmaster Joe de Peyster.*

Our Team is here to answer your questions and help make your giving convenient and impactful. Please do not hesitate to contact Abby Schlater in our Development Office or Head of School, John Dewis.

262-367-6011 x1451
abby.schlater@universitylake.org

617-899-0717
john.dewis@universitylake.org