

## University Lake School - Giving Made Easy

*Thank you for your gift to ULS. Please alert us if you wire money or transfer stock, so we can anticipate and acknowledge your gift!*

### **Stock Transfer**

Broker: SANFORD C. BERNSTEIN & CO., LLC.

DTC #: 0013

Account Name: THE UNIVERSITY LAKE SCHOOL INC.

Account Number: 034-53401

Note: Insert Donor Name Here *(without this information, or direct notification from you, we may be unable to identify the donors of certain securities)*

Bernstein Contact Information: Jay Leonard – 773-680-4694

### **Wire Transfer**

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

### **Checks**

*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** Visit [universitylake.org/give](http://universitylake.org/give).

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

**Required Minimum Distributions (RMD)** *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 are eligible to enjoy a non-trivial tax break on appreciated assets!*

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

We are 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 our Head of School, John Dewis.

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617-899-0717

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