



## Giving Made Easy

*Thank you for considering a gift to ULS; please let us know if you plan 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: Wisconsin Bank & Trust Company - Madison, WI  
Receiving Bank ABA #: 0759 0759 4  
Beneficiary Name: University Lake School, Inc.  
Beneficiary Address: 4024 Nagawicka Rd, Hartland, WI 53029  
Beneficiary Account #: 9966238041  
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](https://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 let us know if you are planning to or would like to 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 our Assistant Development Director, Abby Schlater, or Head of School, John Dewis.

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