



**Instructions for making stock gifts to  
Northwestern University Settlement Association**

Gifts of stock are processed through a trust account at The Chicago Partners Wealth Advisors LLC.

***DTC Book-Entry Eligible Securities***

Name of Receiving Firm or Institution: Fidelity Investments  
Fidelity's DTC Participant No. 0226  
Receiving Account #: 638-188430  
Recipient's Name: Northwestern University Settlement Association  
Re: 638-188430 Northwestern University Settlement Association

***Please specify the organization to which the gift is being made.***

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If you have any questions, please contact Katie Taylor, in the Office of External Affairs, at one of the following:

773-969-5533 (direct line)  
847-533-2829 (mobile)  
773-278-2621 (fax)  
[ktaylor@nush.org](mailto:ktaylor@nush.org) (email)

**Or** contact Dan Toledo, The Chicago Partners Wealth Advisors LLC, at Email  
[dan@ChicagoPartnersLLC.com](mailto:dan@ChicagoPartnersLLC.com)