



## DELIVERY INSTRUCTIONS – DONATING MUTUAL FUNDS

Gifts of mutual funds are initiated by the donor and the financial institution where these funds are held. Information below pertains to donating MUTUAL FUNDS ONLY – please contact the Mercy Home Philanthropy Team if you wish to donate stocks, bonds, ETFs, or other securities.

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### Transfer Information:

Donations of mutual fund shares to Mercy Home for Boys & Girls is a two-step process, and can often take a week or more to complete, once initiated. Please allow enough time and follow the instructions below to ensure a smooth transfer.

**Step 1:** Contact your financial advisor, broker, or custodian bank, and provide the following information (Mercy Home’s DTC transfer info):

<b>Broker:</b>	Midwest Institutional Trust Company
<b>DTC Number:</b>	5409
<b>Account Number:</b>	98-71-N337-01-0
<b>Account Name:</b>	Mission of Our Lady of Mercy, Inc.

**Step 2:** Contact Mercy Home’s Philanthropy Team with the following information:

- Your name and contact information
  - Name of financial institution initiating this transfer (your advisor, broker, custodian)
  - Name of the mutual fund, and approximate shares to be transferred
  - Approximate transfer date for your donation
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### Contact Information:

Donations of Mutual Funds to Mercy Home are handled by Midwest Institutional Trust Services / FIS Wealth Outsourcing Solutions. Relevant contact information for all transfers:

- Mercy Home’s Philanthropy Team: 1-800-378-8266 or [PlannedGift@MercyHome.org](mailto:PlannedGift@MercyHome.org)
- Midwest Institutional Trust Services: [trustandcustody@midwestinstitutionaltrust.com](mailto:trustandcustody@midwestinstitutionaltrust.com)
- FIS Wealth Outsourcing Solutions: [WOS\\_MKE\\_Mutual.Fund.Transfers@fisglobal.com](mailto:WOS_MKE_Mutual.Fund.Transfers@fisglobal.com)