



## DELIVERY INSTRUCTIONS – DONATING SECURITIES

Gifts of stocks, bonds, ETFs, or other securities are initiated by the donor and the financial institution where funds are held. Information below pertains to PUBLICLY TRADED SECURITIES – please contact Mercy Home’s Philanthropy Team if you wish to donate mutual funds or other assets.

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### Transfer Information:

Donations of publicly traded securities to Mercy Home for Boys & Girls is typically a two-step process. 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>	0992
<b>Account Number:</b>	98-71-N337-01-0
<b>Account Name:</b>	Mission of Our Lady of Mercy, Inc.

**Step 2:** Please provide the following information to Mercy Home at [PlannedGift@MercyHome.org](mailto:PlannedGift@MercyHome.org) or by calling 1-800-378-8266:

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

Securities donations to Mercy Home are handled by Midwest Institutional Trust Services for BMO Harris Bank, N.A. 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)  
Sharon Fuentes is our relationship coordinator, and can be reached at 414-255-1906