



STOCK TRANSFER INFORMATION

Thank you for considering a gift of stock. Please find below the information you need in order to transfer stock to Saint Mary's College. To ensure you receive proper credit for your gift, **we request that you send a letter or e-mail to Jordan Marshall at the address below indicating the name of the stock and the number of shares you intend to transfer.** If your gift of stock is for a specific purpose or fund, please let us know. Otherwise your gift will be credited to the Saint Mary's Fund (formerly known as the Annual Fund).

Please notify: Jordan Marshall, Director of Donor Relations
Saint Mary's College
110 Le Mans Hall
Notre Dame, IN 46556
Phone: 574-284-4706 ▪ Fax: 574-284-4749
jmarshall@saintmarys.edu

The College's Federal Tax Identification Number is 35-0868158. The full, legal name of the College is Saint Mary's College, Notre Dame.

All gifts of stock are valued by Saint Mary's at the average of the high and low of the stock price on the date the shares are electronically deposited in the College's account. The valuation assigned by Saint Mary's is for internal gift recognition purposes only. The amount and date of Saint Mary's valuation may differ from the amount and date on which your charitable contribution is valued for tax purposes. Please consult IRS Publication 526 or your tax advisor if you have questions.

ELECTRONIC TRANSFER

Gifts of stock can be made with your broker's assistance by electronic transfer. This process works for all publicly traded shares of stock. **Request your broker to transfer the stated number of shares electronically to:**

National Financial Services DTCC# 0226
For the benefit of: Saint Mary's College, Notre Dame, Indiana
Account# NTG-027743

If you have questions, please contact Jordan Marshall at the address above.

CERTIFICATES, MUTUAL FUNDS, CLOSELY HELD STOCK

If you have a stock certificate, mutual fund, or closely held stock you would like to give to Saint Mary's College, please contact Jordan Marshall for current information and appropriate forms.

PLEASE NOTE: Some assets take longer to accept and process than others. Please plan your year-end charitable giving as early as possible. After December 15, we cannot guarantee completion of mutual fund or stock certificate transfers.