

Thank you for your interest in supporting Saint Mary's College with a gift of stock or other securities.

Gifts of appreciated stocks and mutual funds owned for more than one year are usually a more tax-advantageous option than donating the same amount in cash. You can make your gift to the Saint Mary's Fund or specify an area that you would like the proceeds to support. The College benefits by selling the stock without paying taxes on the gain, and you benefit from making a contribution that would be larger than what you might have been able to donate in cash.

Stock Transfer Instructions

Making a gift of electronically transferred shares to Saint Mary's College is easy and can be completed in two steps!

FIRST Please email the Saint Mary's Development Office (development@saintmarys.edu) or call 800-762-8871 with the following information:

- Your name and address
- Name and/or ticker symbol of the security
- Number of shares
- The area you intend to designate for your gift (Note: The Saint Mary's Fund supports the areas of greatest need at the College.)

This information will help us identify your gift and provide you with a timely acknowledgment of your gift. Without a completed form, we will not be able to provide a receipt for your gift.

SECOND Please provide your investment advisor or broker with detailed instructions of the gift that you would like to make to Saint Mary's College, including the name of the stock and the number of shares to be transferred from your account to Saint Mary's at:

1st Source Bank DTC #2663
Wealth Advisory Services
100 North Michigan Street
South Bend, IN 46601
For Credit to Account: 610307134
Account name: Corporation of Saint Mary's College Stock Gift Agency
Donor Name & Address

Valuation: For internal recognition purposes, the gift value is determined by using the mean between the highest and lowest quoted price on the date the shares are received in the College's account. You will need to consult with your tax advisor to determine whether to use this value or another value for tax purposes. Please refer to IRS Publication 561 for further details.

Mutual Fund Transfer Instructions

Gifts of mutual funds will be processed through the College's financial custodian, 1st Source Bank. Unlike DTC-eligible securities (like stocks) that may be exchanged almost instantaneously between two legal entities, transferring ownership of a mutual fund requires special handling. Please reach out to the Saint Mary's Development Office (development@saintmarys.edu or 800-762-8871), and we will get things started for you.