



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. **We do request that you send a letter or e-mail to Adaline Cashore 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 College Annual Fund. In this way, we can ensure that you receive proper credit for your gift. The College's 501(c)(3) tax-exempt identification number is: 53-0196617. The full, legal name of the College is Saint Mary's College, Notre Dame.

Please notify: Adaline S. Cashore, Director of Donor Relations
Saint Mary's College
110 Le Mans Hall
Notre Dame, IN 46556
Phone: 574-284-4706 • Fax: 574-284-4749
acashore@saintmarys.edu

All gifts of stock are valued at the average price on the date they are electronically deposited in the College's account or the date of the postmark (for certificates). 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.

Gifts of stock can be made in two ways: Electronic Transfer or Manual Transfer. Instructions for each follow.

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 or your broker has questions, please contact Adaline Cashore at the address above.

MANUAL TRANSFER

Stock certificates physically held in your possession can be gifted in whole or in part to Saint Mary's College. If you wish to make a partial gift of shares held in a certificate, you will need to send the shares back to the company's transfer agent and request that the shares be split into two certificates – one in your name and one in the College's. Your stockbroker or bank officer can help with this process.

If you have the stock certificates in hand, simply endorse the certificates over to the College's name (Saint Mary's College, Notre Dame, Indiana) using the form on the back of the certificate. Also, send a letter indicating that the shares are a gift to the College. The letter must be signed by all holders of record on the front of the certificate. Please mail the certificate(s) to: Adaline S. Cashore, Director, Donor Relations, at the address above. Send certificates registered mail.