



Holy Cross Monastery

Donating Appreciated Securities

Your gift of appreciated securities (i.e., stocks or other securities) is gratefully welcomed at any time. To promptly process and acknowledge your gift, please note what we'll need to receive in writing from you or a broker acting on your behalf.

Before Initiating Transfer

Please provide the following information *in writing* to our Bursar with the following information:

- ▶ Your full legal name
- ▶ Name of the stock
- ▶ Exact number of shares being transferred
- ▶ CUSIP number for the stock
- ▶ Company name and DTC number of your broker

Our mailing address:

P.O. Box 99
West Park, NY 12493
Attn: Bursar

Delivering Securities to Holy Cross Monastery

Please provide the following information so your broker can transfer *DTC Eligible Securities*:

- ▶ Brokerage Firm: Merrill Lynch
- ▶ DTC #:8862
- ▶ Account Name: Holy Cross Monastery
- ▶ Tax ID Number: 16-1560723
- ▶ Account Number: 808-02363

To transfer *other securities*, please provide this address:

The Nolan Group
Merrill Lynch, Pierce, Fenner & Smith Inc.
69 State Street – 16th Floor
Albany, New York 12207

Our Merrill Lynch Contact

Jennifer Nolan at 518-462-8330

*If you have questions about how your legacy might meet our needs,
please contact Br. Bernard Delcourt (BernardJeanDelcourt@gmail.com)*