



DELIVERY INSTRUCTIONS – DONATING POOLED INVESTMENTS

- *Gifts of mutual funds, ETFs, or other pooled investments are initiated by the donor and the financial institution where these funds are held.*
 - *Information below pertains to donating pooled investments only – please contact Mercy Home if you wish to donate stocks, bonds, or other securities.*
-

For Advisors:

To donate mutual funds, ETFs, or other pooled investments to Mercy Home for Boys & Girls, please provide the following information to your financial advisor/broker dealer:

DTC#: 5409
F/C: 98-71-N337-01-0
Account: Mission of Our Lady of Mercy, Inc.

Donations of Pooled Investments are handled by Reliance Trust Company / FIS Wealth Outsourcing Solutions. Advisors, please contact the FIS Mutual Fund Department to coordinate transfer at 1-920-497-5274 or WOS_MKE_Mutual.Fund.Transfers@fisglobal.com

For Donors:

To ensure a smooth transfer, please provide the following information to Mercy Home at PlannedGift@MercyHome.org or by calling 1-800-378-8266:

- 1) Your name and contact information
 - 2) Name of financial institution processing your donation
 - 3) Name of the mutual fund or other pooled investment, and approximate shares
 - 4) Approximate transfer date for your donation
-

For assistance or questions, please contact our Philanthropy office directly:
1-800-378-8266 * PlannedGift@MercyHome.org

Thank you for supporting Mercy Home for Boys & Girls!