



## DELIVERY INSTRUCTIONS FOR DONATIONS OF SECURITIES

### For Advisors:

*To donate stocks, bonds, or other securities to Mercy Home for Boys & Girls, please provide the following information to your financial advisor/broker dealer:*

MHBG Broker: BMO Harris Bank, N.A.  
DTC#: 0992 (for *Stocks & Bonds*)  
F/C: 98-71-N337-01-0  
Account Name: Mission of Our Lady of Mercy, Inc.

Contact: Sharon Fuentes  
Contact phone: (414) 287-7250  
Contact email: [trust.custody@bmo.com](mailto:trust.custody@bmo.com)

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### For Donors:

*To ensure a smooth transfer, please provide the following information to Mercy Home at [PlannedGift@MercyHome.org](mailto: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 stock to be donated and approximate shares
  - 4) Approximate transfer date for your donation
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If you wish to donate physical stock certificates or are interested in donating assets from a mutual fund, ETF, or other pooled investment, please contact our Philanthropy office directly:

1-800-378-8266 \* [PlannedGift@MercyHome.org](mailto:PlannedGift@MercyHome.org)

Thank you for supporting Mercy Home for Boys & Girls!