



DELIVERY INSTRUCTIONS – DONATING MUTUAL FUNDS

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

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

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

Donations of Mutual Funds 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, and approximate shares
 - 4) Approximate transfer date for your donation
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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!