

**HOLY CROSS
COLLEGE** 
at Notre Dame, Indiana

STOCK TRANSFER INFORMATION

Thank you for considering a gift of stock. Please find below the information you need in order to transfer stock to Holy Cross College. To ensure you receive proper credit for your gift, we request that you send an e-mail to Mike Brach at the e-mail 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 Annual Fund.

Please notify:

Mike Brach
Vice President for Development
Holy Cross College
54515 State Road 933 North
P.O. Box 308
Notre Dame, IN 46556-0308
Phone: 574-239-8368 ▪ Fax: 574-239-8323
mbrach@hcc-nd.edu

The College's Federal Tax Identification Number is 35-1148835 . The full, legal name of the College is Holy Cross College Inc.

All gifts of stock are valued by Holy Cross College at the average of the high and low of the stock price on the date the shares are electronically deposited in the College's account. The valuation assigned by Holy Cross is for internal gift recognition purposes only. The amount and date of Holy Cross' 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.

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: Cetera Investment Services DTC# 0701 For the benefit of: Holy Cross College, Notre Dame, Indiana, Account Name Holy Cross College Inc. Account# 2MH16453. If you have questions, please contact Mike Brach.

CERTIFICATES, MUTUAL FUNDS, CLOSELY HELD STOCK

If you have a stock certificate, mutual fund, or closely held stock and you would like to give to Holy Cross College, please contact Mike Brach for current information and appropriate forms.

PLEASE NOTE: Some assets take longer to accept and process than others. Please plan your year-end charitable giving as early as possible. After December 15, we cannot guarantee completion of mutual fund or stock certificate transfers.