

## INVESTMENT SECURITIES DONATION FORM & TRANSFER INSTRUCTIONS

Thank you considering a donation of investment securities to Bon Secours Mercy Health Foundation.

### STEPS FOR DONATING:

1. Please provide the following Depository Trust Company (DTC) transfer instructions to your financial advisor or broker:

DTC No.: 0997  
Receiving Institution: State Street Bank and Trust Company  
Account Title: Bon Secours Mercy Health – Gift  
Account No.: DY8E  
Tax Identification No.: 52-1301088  
Address: 1701 Mercy Health Place, Cincinnati, OH 45237

2. Please provide the following information:

Your Name :

Your Address :

Name of Security :  Number of shares :

Name of Broker :  Brokers Phone # :

3. Please email this completed form to [give@bsmhealth.org](mailto:give@bsmhealth.org). This alerts us to your gift and ensures that we can properly recognize you as a donor and acknowledge your gift.

For additional information or questions regarding donating investment securities (including donating physical stock certificates or stock in closely held businesses) please contact Brad Blandin, V.P. Charitable Estate and Gift Planning, by phone (419) 251-1803 or email [bblandin@bsmhealth.org](mailto:bblandin@bsmhealth.org)

**This donation will be valued at the median market price on the date of the gift. For securities wired into our account, the legal gift date is the day they are received into the Bon Secours Mercy Health account.**