



How to Make a Gift of Stock Through a Wire Transfer:

Thank you for considering a gift of stock or shares of a mutual fund. A gift of stock is the easiest transaction. You simply request your broker to wire transfer shares to our account. If you decide to transfer stock, it can be done electronically.

You should tell your broker that our DTC number is #0075. Our account is with M&T Financial Services (LPL Financial). You should specify that the transaction is for the benefit of The Loretto Foundation. Our account number is 7463-0153. In the case that you require this, our tax ID is 22-2339225. We are a 501 (c)(3) corporation and your gift is tax deductible.

Once you have notified your broker to make the transaction, **please contact us at (315) 413-3482 to notify us that a stock transfer is in process and provide us with the name and address of the donor for official acknowledgement; as well as the name and number of shares being transferred.** This will ensure that the securities are properly processed to support the fund of your choice and receipted. *Note: *Transfer stock does not come with any identifying information.*

Once we have received the stock in our account, we will give you the high, low and closing value of that stock on the day of transfer. Using this method, you pay no capital gains.

Instructions for wire transfer of stock:

M&T Financial Services/LPL Financial

DTC #0075

Account name: The Loretto Foundation

Account# 7463-0153

Tax ID# 22-2339225

Please indicate on the transaction:

For the Benefit of: The Loretto Foundation
700 E. Brighton Ave., 1st Floor
Syracuse, NY 13205

If you or your broker has any questions, please contact Christine Reilly, Treasury Operations Manager, (315) 413-3648.

The Loretto Foundation is a registered 501(c)(3) nonprofit organization #22-2339225. Your donation is tax-deductible to the extent allowed by law. No goods or services were provided by The Loretto Foundation in return for this contribution.

The Loretto Foundation • 700 East Brighton Ave. 1st Floor • Syracuse, NY 13205
foundation@lorettosystem.org • 315.413.3482