



## ***Cretin-Derham Hall***

### **Procedure for transferring a charitable gift of Marketable and Non-Marketable Securities**

Cretin-Derham Hall is blessed with many alumni/ae, parents, and friends who give generously in many ways, including gifts of stock, bonds, or other securities that have appreciated in value or are no longer serving their purpose as an investment. This is a great way to support CDH because tax law provides many incentives for this type of gift. Please see the information below to help you make your gift.

Contact your broker to transfer the securities to:

**Merrill Lynch**  
**Jim Scheuring**  
**225 South Sixth Street**  
**Suite 4400**  
**Minneapolis, MN 55402**  
**612-349-7877 (Jim) - [james\\_scheuring@ml.com](mailto:james_scheuring@ml.com)**  
**612-349-7873 (Joyce Flanders) – [joyce\\_flanders@ml.com](mailto:joyce_flanders@ml.com)**  
**612-325-6288 (Fax)**

**Account 673-04070**  
**DTC # 5198**  
**CDH Federal ID # 41-1570394**

Please call the CDH Director of Development, Frank Miley, at 651-696-3320 to inform us of your gift including the specific security, the number of shares, the name, address, and telephone number of your broker, and any special instructions for your gift to Cretin-Derham Hall.

Thank you!