



Gifting securities, mutual funds and cash

Transferring securities, mutual funds and cash to Sacred Heart Academy is quick and easy. By doing so you can reduce your capital gains taxes on securities and minimize taxable income. The instructions below can be provided to your financial institution in order to make a transfer. We will provide you with a substantiation letter to use for tax purposes.

Sacred Heart Academy securities, mutual funds and cash transfer instructions

Securities/Mutual Funds Transfer:

- Participant ID: 2039
- Agent Bank ID: 94952
- Institutional ID: 94952
- Agent Internal A/C: The Philadelphia Trust Company.; #11075-C
- FFC: Sacred Heart Academy: #PTC767

Cash Transfer:

- Firsttrust Bank
- ABA: #236073801
- A/C#: 070-0302219
- Credit: The Philadelphia Trust Company
- FFC: Sacred Heart Academy

Matthew Walker
Executive Vice President
The Philadelphia Trust Company
215-979-3448
mattwalker@philadelphiatrust.com

Provide Sacred Heart Academy with the following information

- Donor name
- Name of security or mutual funds
- Number of shares
- Expected Date of transfer

Send information to:

Victor D'Ascenzo
Sacred Heart Academy Bryn Mawr
610-527-3915 Ext. 223
Victor.dascenzo@shabrynmawr.org