



MERCERSBURG ACADEMY

Procedures for Making Gifts of Stock

If your stock is in street name (held in an account with your broker), please telephone your broker with instructions to wire the shares directly to the Mercersburg account at PNC Bank. Your broker will need the following information:

1. Mercersburg's account number: 21-27-001-6943274
2. Mercersburg's account name: Mercersburg Academy Stock Gift
3. The DTC number: 2616
4. Our broker's name: Adam Bozich
5. Our broker's telephone number: 1-412-768-9680

Fed. I. D. # 23-1365963 (The Regents of Mercersburg College)

Important: Please ask your broker to inform the Academy's broker of your name. Without this information, Mercersburg's broker will not know to whom the gift should be credited. In addition, please ask your broker—or you may do so yourself—to inform the school via giving@mercersburg.edu of your intent noting the approximate shares and name(s) of stocks being transferred so that we are certain to quickly credit the proper donor.

Please note that the current PNC account replaces a prior account held at Wells Fargo that is no longer active.

Revised: 2/4/21